

PROJECT WORK STATEMENT

TITLE MARKET ASSESSMENT OF INTERACTIVE VIDEO

CLIENT Interactive Training Systems

CONTRACT: ATTACHED \_\_\_\_\_ TO FOLLOW \_\_\_\_\_ LETTER \_\_\_\_\_ VERBAL X

PROJECT LEADER R. Peterson PROJECT CODE YAIV

DATE STARTED 9/19/83 PLANNED COMPLETION DATE 10/14/83

LEVEL OF EFFORT(Professional Man Days) 12

TOTAL CONTRACT VALUE: \$ or ~~£~~ \$14,500.00

REVENUE DISTRIBUTION (% or \$) INPUT US 100% INPUT LTD \_\_\_\_\_

REIMBURSABLE EXPENSES: NO \_\_\_\_\_  
YES X

EXP. BUDGET Up to 25% TO COVER: TRAV: X  
TELE: X  
RPT. PREP.: \_\_\_\_\_  
OTHER: X

BILLING SCHEDULE DESCRIPTION 50% on authorization  
50% on completion

PROJECT DESCRIPTION Interview most likely prospects for interest  
in an interactive video approach to data processing training.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

INDICATE TYPE OF WORK: REPORT X PRESENTATION X

THANK YOU PACKAGE: YES \_\_\_\_\_ NO X

ACCOUNTING USE ONLY: ENTERED ON CURRENT PROJECT LIST ✓

DISTRIBUTION

CONTRACT FILE

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NEW JERSEY

INPUT LTD.

R. Peterson  
Originator

JAN M.

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9/22/83  
Date Typed



# Importance of Training Goals

## Rating of Live vs Interactive Video

(Give 1 to 5 points for each category; 1 = low, 5 = high)

Importance      Goal

Importance      Rating  
Live      IV

Ability to meet student's schedule  
(e.g., start anytime, stop & resume)

Ability to match student's  
competence to material

Ability to pace student's speed

Ability to make sure that  
student understands

Feedback to student on progress

Feedback to <sup>instruction medium</sup>  
<sub>student</sub> on ~~organization~~ progress

Feedback to <sup>student</sup>  
administration on progress

Ability to answer student's questions

Ability to teach technical subjects  
(e.g., languages, CICS, MVS, etc)

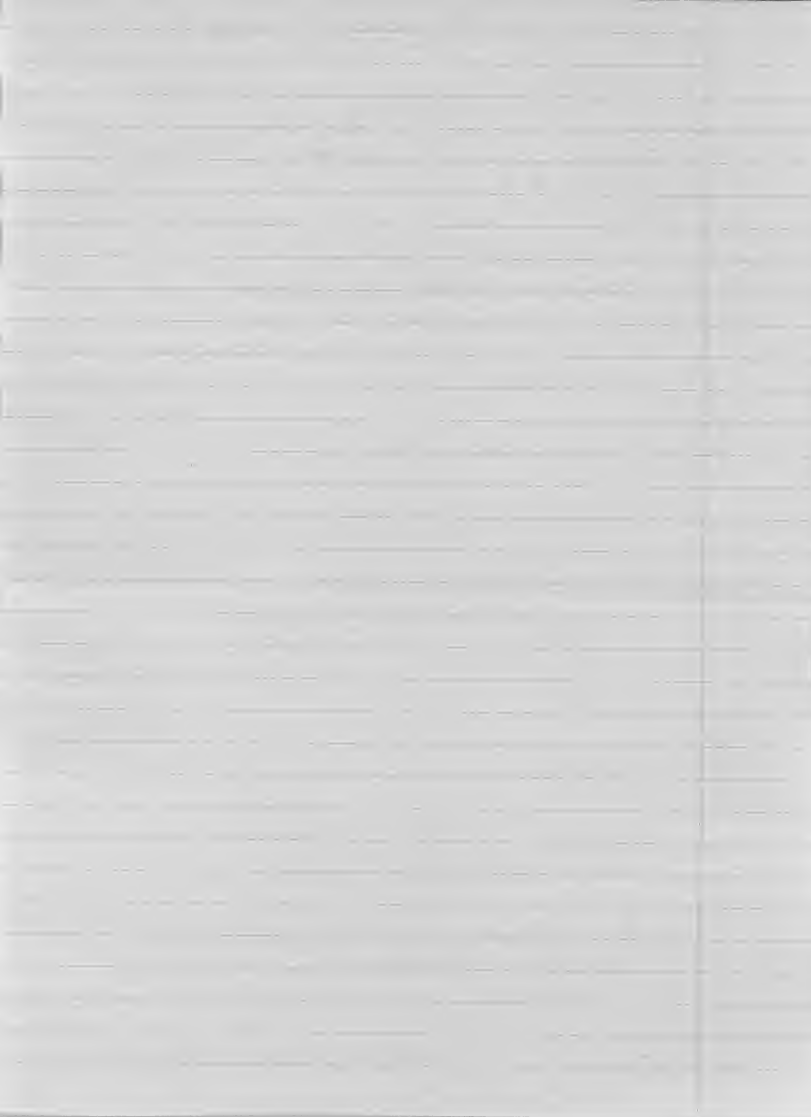
Ability to teach judgmental subjects  
(e.g., project management, supervisory skills, etc)

Ability to teach concepts (e.g., systems analysis, logical database design, etc)



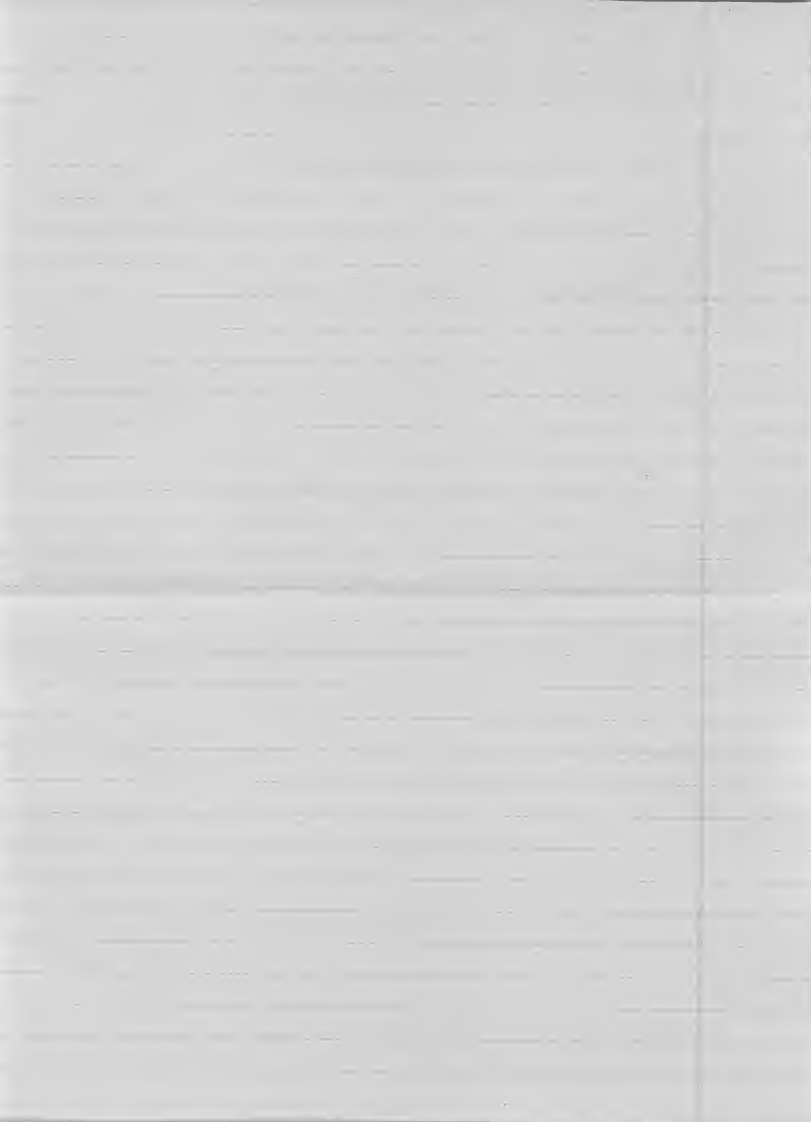
## Areas to be Expanded in Phase II

- Identified as critical areas in Phase I
  - Drafts of written <sup>materials</sup> ~~handouts~~ developed for ITS review
  - Some/all handed out to respondents for their reactions/assessments
  - None to be retained by respondents
- Issue areas
  - Scoring options: reaction
  - Mastery test groundrules: reaction
  - Course description: reaction
    - UNIX
    - Others
  - Importance of specific training goals: rating
  - Comparison of live vs. interactive video in meeting goals: rating
  - Cost structure of live vs interactive video: acceptable cost level  
(assessment of)
  - Cost of tailoring ~~to~~ ITS materials: Assessment of acceptable levels



## Phase II Target Companies

- Additional major corporations
- Major hardware & software vendors
  - Internal use
  - Development of courses for proprietary products
  - Potential licensees for vanilla/tailored courses





November 1, 1983

Mr. John Shackleton  
Director, DP Product  
Interactive Training Systems, Inc.  
4 Cambridge Center  
Cambridge, MA 02142

Dear John:

INPUT is pleased to submit this Addendum to the agreement between ITS and INPUT signed September 30, 1983. This Addendum specified the refinements of Phase IB as verbally authorized by Mr. Barber on October 26, 1983. Please have this Addendum signed and returned to INPUT so that this work may proceed on schedule.

I will send you draft worksheets to be used during these 13 demonstration/interviews in the next few days. When you have had an opportunity to review these worksheets we will discuss your required modifications at your convenience. Also, as soon as possible please send me a list of companies that you want us to include in this phase. With your list we'll be able to set up the appointments in the next two weeks while you are traveling. Interviews should begin the week of November 21 with a final presentation to ITS the week of December 12.

As always, I look forward to working with you on this project.

Sincerely,



Richard L. Peterson  
Senior Consultant

RLP/lcg  
Attachment



ADDENDUM TO PROPOSAL

(PHASE 1B)

MARKET ASSESSMENT  
OF  
INTERACTIVE VIDEO TRAINING  
IN THE  
DATA PROCESSING MARKETPLACE

FOR

INTERACTIVE TRAINING SYSTEMS, INC.  
CAMBRIDGE, MA

FROM

INPUT, INC.  
PARK 80 PLAZA WEST ONE  
SADDLE BROOK, NJ 07662

NOVEMBER 2, 1983

INPUT



## INTRODUCTION

This is an addendum to the proposal submitted to Interactive Training Systems on September 2, 1983. In that proposal INPUT proposed a three-phase approach to the issues being addressed. The first part of Phase I was approved and completed. ITS now desires to complete Phase IB. While the underlying objectives of this latest research are the same as originally proposed, findings from Phase IA permit the refinement of the scope of Phase IB. Those proposed refinement of the original proposal are presented here.

## UNDERSTANDING

The pattern of response to ITS' interactive video product seemed to indicate that the target market would perceive the training value to be far superior to passive video in most respects and nearly equal to live instruction. It was also revealed that clients may have concern over the number of learner options in the system, the instructor's ability to manage such a flexible system, and the use and potential misuse of the scoring information. Potential clients also seem to desire a system capability that facilitates customization of training products produced by ITS.

## SCOPE

In the course of Phase IB INPUT will focus on:

- A confirmation/reputation of the general reactions to and concerns about ITS' interactive video training for data processing.
- A refinement of the perceived dollar value of this IVT product vis-a-vis the training needs and constraints of the company.
- An initial assessment of price elasticity for selected lease options.



- The impact of various product strategies regarding learner options, instructor management, scoring information, and customization on perceived product value.

## PROPOSED METHODOLOGY

INPUT will conduct on-site demonstration/interviews of 13 companies obtained from a pool of target companies specified by ITS. The format of these sessions will be similar to those conducted in Phase IA. However, less time will be spent collecting general impressions in favor of those price-related items noted above.

To facilitate this increased focus on specifics, a series of worksheets, jointly developed and refined by ITS and INPUT, will be used. Each worksheet will present alternative product or pricing scenarios. Clients will be asked to assess the impact of each scenario on their perceived value.

## SCHEDULE

- The following schedule seems reasonable although two holidays and end-of-year business activities may retard completion of this project as scheduled. Also, the schedule reflects INPUT's understanding that ITS personnel will not be available to conduct these demonstrations until the week of November 21st. This schedule will be adjusted according to ITS' needs and personnel availability.
- Week 1 (Estimated week of 10/31).
  - Authorization
  - Schedule interviews
- Week 2 (11/7-11)
  - Schedule interviews





- Develop worksheets
- Week 3 (11/14-18)
  - Schedule interviews
  - Finalize worksheets
- Week 4-6 (11/21-12/9)
  - Conduct demonstration/interviews
- Week 7 (12/12-16)
  - Present Phase IB results

#### FEE

- INPUT's professional fee for this engagement is \$21,500 plus expenses.
- One-half of the fee is due and payable upon authorization. The remainder of the fee plus any out-of-pocket expenses incurred will be billed at the conclusion of this phase.
- To facilitate authorization please complete the signature block and return to INPUT.

AUTHORIZED BY: INTERACTIVE TRAINING  
SYSTEMS, INC.

ACCEPTED BY: INPUT, INC.

\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE



4A1V

PROPOSAL

MARKET ASSESSMENT  
OF  
INTERACTIVE VIDEO TRAINING  
IN THE  
DATA PROCESSING MARKETPLACE

FOR

INTERACTIVE TRAINING SYSTEMS, INC.  
CAMBRIDGE, MA

FROM

INPUT, INC.  
PARK 80 PLAZA WEST ONE  
SADDLE BROOK, NJ 07662

SEPTEMBER 2, 1983

INPUT



## INTRODUCTION

In this proposal INPUT sets forth its methods, schedules, and professional fees to conduct market research on interactive video training products in the data processing training marketplace.

This proposal is based on INPUT's understanding of ITS' pending business strategy decisions that this new intelligence is intended to support and on our experiences with interviews (over 12,000 annually) in support of hundreds of projects of a similar nature in our nine-year history. INPUT believes this proposal to be in keeping with your information needs but welcomes the opportunity to modify these specifications to better serve you should that be necessary.

## UNDERSTANDING

Interactive Training Systems has been engaged in the business of custom training product development since its inception in 1981. Use of state-of-the-art technologies in microcomputing and video permits ITS to produce some of the most sophisticated interactive video training available.

ITS is planning to expand this business base to include the development and marketing of interactive video training products for sale through its own sales network. The product line targeted for this new launch is data processing training. ITS is already in the process of developing UNIX modules and is considering the development of courses in logical data base design and IMS training. With success in these first starts, ITS intends to add to these offerings in data processing as well as expand into other disciplines such as engineering, insurance, and banking.

The financial and managerial risk associated with this new venture requires that ITS seek independent verification and expansion of non-UNIX data processing information in several key areas. INPUT has been requested to submit this proposal to support this requirement.

## SCOPE

In the course of the study the following issues should be addressed:

- Is there currently a sufficient market for interactive video training products among large, leading edge ("flagship") companies to support the costs of initial product development?
  - What companies are these?
  - What courseware do they require?
  - How strong is the need for training in logical DBMS?
  - What are the concerns regarding the course database philosophy and authorship?
  - For what other subjects is there high need?



- What are the conditions under which the ITS product could replace existing training in these content areas within these flagship companies?
- What are the characteristics of the longer-term market?
  - What is the size of the overall market growth rate?
  - What courses are required?
  - What are the attributions of companies that are likely to be customers? Non-customers?
  - What would have to change to make non-customers into good prospects?
    - Price declines?
    - Other vendor offerings?
    - Flagship examples?
    - Cost/benefits experience?
    - Greater exposure to product?
    - Larger library?
    - Second-generation products?
- What are pricing elasticities by...
  - Flagship vs non-flagship?
  - Degree of dedication to training by company?
  - Current training practices vs interactive?
  - Size of company, and IS departments?
  - By type of course?
  - By level of demonstrated or perceived benefits?
- What would be the acquisition process within a prospective customer organization?
  - Who (which titles) would make the recommendation?
  - Who would ultimately make the decision?
  - How long would the acquisition process take?





- Apart from pricing levels, what particular pricing terms would be most effective?
  - Bundled hardware and software vs unbundled?
  - Discounts for multiple copies/sites?
  - Usage vs module pricing?
- Would the ITS product increase the overall size of the DP training market, or would ITS' market share have to come out of existing vendors' shares?

### PROPOSED METHODOLOGY

INPUT believes that the most meaningful information for decision making will result from a phased approach to the proposed research. The specification for each phase after the first will be based on the results of the previous phase of research. In this way ITS will have the additional advantage of committing funds based on the usefulness of the information from the previous phase and on the avenues of opportunity the research results open or close.

Specifically, INPUT proposes that the following research phases be conducted:

- Phase 1: Interview the most likely flagship prospects to assess their willingness to commit to this interactive video approach to data processing training. (It would not be possible to project general market size of receptiveness based on this phase's research.) This phase would be further divided into Phases 1A and 1B:
  - Phase 1A would interview 7 companies to ascertain their receptiveness. If there was overwhelming response one way or the other, interviewing would go no further, otherwise Phase 1B would be conducted.
  - Phase 1B would interview 13 additional companies.
- Phase 2: Interview approximately 100 additional companies, selected at random to identify general interest levels, perceived value, key course areas, market size, etc.
- Phase 3 - This phase would be a market scan that would identify the number, size and identity of sites with IMS installed. It would take place during or after Phase 1A.
- The tasks to be completed by INPUT in each of these phases is described below. Since phases 1B and 2 are partially dependent on and subject to the results of the previous phase(s), it is likely that the specifications for some of these phases will be altered from those listed below. INPUT will, therefore, provide ITS with an update of the proposed specifications prior to conducting each of these phases.



## A. PHASE ONE

- On-site demonstrations of ITS' interactive video capabilities as captured in the UNIX prototype course will be provided to key representatives of selected companies. One demonstration per day will be scheduled to allow time for equipment transportation and set up, scheduling difficulties, etc.

- INPUT, with information from ITS and INPUT's own intelligence, will develop criteria on which to select key prospects for the proposed product.
- A final list of companies to be contacted will be developed. That list, most of which will be derived from ITS' contact files, currently includes:

AT&T	Bell Labs
Mobil Oil	CitiCorp
Allstate	Standard Oil of Indiana
Exxon	GTE (Tampa)
ITT (Stafford, CT)	Aetna
Western Electric	Kemper
J.C. Penney	Bank of America
American Express	IBM (Systems Research)
EDS	Federal Gov't (IRS, DOD, Federal Reserve)
Bechtel	Aramco
Hartford Insurance	Blue Cross/Blue Shield

- INPUT will arrange an appointment for an audience with company representatives targetted to include:

MIS Vice President/Director  
Director of Systems and Programming  
Director of Operations  
EDP and Corporate Training Director  
Vice President of Personnel

- INPUT will consult with the ITS staff person conducting the demonstration to develop scenarios of the demonstration/interview that will both present the product positively and facilitate the objective interviewing to follow.



- A senior INPUT consultant will conduct a group interview of the company representatives after the demonstration. The purpose of the interview will be to determine interest, acceptance, concerns, perceived value, etc. of this interactive video approach to data process. Such protocols will be carefully crafted to elicit a maximum amount of detailed information on the issues.
- Analyses of these interview results will be presented to ITS in both oral and written form. The focus of the report will be on the explanation of information that addresses the viability of this new business and the issues, if any, that impede a firm "go/no go" decision.
  - Information will be presented on the prospects, their level of interest, and concerns.
  - Hypotheses for entry and pricing strategies to be tested in Phase Two will be presented at the conclusion of this phase.

#### B. PHASE TWO

- The Phase One effort will lead to an identification of some indication of market segmentation characteristics of good prospects. To confirm these characteristics and to qualify additional prospects are the goals of Phase Two.
- Interviews of approximately 100 additional companies will be completed.
  - INPUT, with assistance from ITS, will develop a pool of "Second Level" prospects.
  - Company training representative will be invited to attend one of eight group demonstrations/interviews in two or three metropolitan areas.
  - After a group demonstration a questionnaire, developed by INPUT and reviewed by ITS, will be used to elicit responses from key decision makers in each company.
    - The results will include a description of key market segmentation characteristics and confirmation of entry and pricing strategies.
    - An additional list of "qualified" prospects will be available.
  - The results of these interviews will be summarized and presented to ITS.
  - Follow-up telephone interviews will be conducted as necessary.



### C. PHASE THREE

- The tasks associated with this phase of the research are designed to help ITS make a determination on the sales potential of an interactive course on IMS.
  - Secondary research will be used to identify sites that have IMS installed and meet many of the general characteristics of good prospects as identified in Phase I.
  - INPUT will design a telephone interview protocol to establish general relationships between installation size and IMS training requirements, unmet training needs, etc. This protocol will be submitted to ITS for review and approval before interviews are conducted.
  - INPUT will contact a knowledgeable representative in approximately 25 companies and conduct a telephone interview with them.
- This information will be summarized and presented to ITS.
  - The focus will be on determining the likely potential market for an interactive video product.
  - Forecasts of market size vis-a-vis pricing strategies will be presented.
  - Additional sales leads will be identified.

### SCHEDULE

- We believe the following schedule is reasonable although the completion time, particularly for Phase I, is very dependent on companies' availability for interviews.
- Week 1:
  - Companies identified and initial contact made.
  - Demonstration/interviews scheduled.
  - Interview protocols and demonstration scenarios established.
- Week 2:
  - Conduct demonstration/interviews (Phase IA).
- Week 3:
  - Complete Phase IA interviews.
  - Complete data analysis.





- Week 4:
  - Present results of Phase 1A.
  - Schedule Phase 1B interviews
- Weeks 5 and 6:
  - Conduct Phase 1B demonstration/interviews.
- Week 7:
  - Complete data analysis.
- Week 8:
  - Present results of Phase 1B.
- Week 9:
  - Identify additional prospects (Phase 2).
  - Develop protocol (Phase 2).
  - Identify IMS installations (Phase 3).
- Week 10:
  - Interview prospects (Phase 2)
  - Interview IMS sites (Phase 3).
- Week 11:
  - Present results of Phase 2.
  - Present results of Phase 3.



## FEES

INPUT's professional fees for this engagement as described in this proposal are as follows (fees for phases 1B and 2 are for planning purposes, contingent on experience gained in Phase 1A):

- Phase 1A - \$14,500 Plus Expenses
- Phase 1B - \$21,500 Plus Expenses
- Phase 2 - \$17,500 Plus Expenses
- Phase 3 - \$ 9,500 Plus Expenses
- Considering the necessity for on-site interviews it is likely that the out-of-pocket expenses (travel, telephone, production, etc.) will add approximately 25 percent to the professional fee for Phase 1A and 1B. Out-of-pocket expenses for Phase 2 and 3 will be estimated before the award. All expenses are, of course, documented and charged at cost.
- One-half of the professional fee for each phase or subphase is due and payable upon authorization of that phase. The remainder of the fee plus any out-of-pocket expenses incurred will be billed at the conclusion of that phase.
- This proposal remains in effect until September 30, 1983.

## CONCLUSION

INPUT believes it is extremely well qualified by prior experience to execute this challenging assignment in a meaningful and cost-effective manner. Your confidence in us will be well rewarded.

To facilitate authorization, please complete the signature block below and return to INPUT.

AUTHORIZATION: INTERACTIVE TRAINING  
SYSTEMS, INC.

ACCEPTED BY: INPUT

NAME

NAME

TITLE

TITLE

DATE

DATE

INPUT



R. Peterson  
12/15/23  
Y.A.V

## TRAINING ORGANIZATION PROFILE

### INSTRUCTIONS

To help INPUT better understand your company's data processing training operations would you please complete the following questions.

1. How many full-time dp training professionals (coordinators, designers, trainers) does this facility have?  
\_\_\_\_ curriculum designers  
\_\_\_\_ coordinators  
\_\_\_\_ trainers
2. How many data processing students receive training through your department each year? \_\_\_\_
  - a. How many different courses does this include? \_\_\_\_
  - b. How many total instruction units (modules) are completed?  
\_\_\_\_ hours/days/other \_\_\_\_ (Please specify)
3. What is the size of your current DP training budget? \$ \_\_\_\_\_
4. What portion of your budget do you spend on actual instruction (excluding overhead such as administration, facilities, etc.). \_\_\_\_\_ %
5. Of the amount in #3, how is that budget divided between:

Public Seminars	____ %
Live instruction (in-house)	____ %
Video	____ %
CBT	____ %
Other materials (Please specify)	____ %

\_\_\_\_\_  
\_\_\_\_\_

(Self-study)	____ %
	100%



6. What are your annual expenditures for course development?

Personnel \$ \_\_\_\_\_

Materials \$ \_\_\_\_\_

7. What are your annual expenditures for purchased/leased courses?

\$ \_\_\_\_\_





## IMPORTANCE OF MEETING TRAINING GOALS

### INSTRUCTIONS

Listed below are several considerations frequently mentioned by trainers when selecting instructional formats and materials.

1. Please review these considerations,
2. Add any additional ones that you wish,
3. Rate the importance of each goal in your training organization,
4. Rate live, video and interactive instruction on how well each meets this goal.











PROPOSED COURSES  
FOR  
INTERACTIVE VIDEO TRAINING

INSTRUCTIONS

ITS anticipates the development of a library of data processing training courses. They want to concentrate their development efforts on those courses that would be most useful to you.

Listed below are course titles in several categories. Please check the courses with which you would most likely use this interactive video system.

DATA PROCESSING FUNDAMENTALS

☐ Introduction to Data Processing

LANGUAGES

☐ ADA

☐ C

☐ SHELL

☐ Other (Please specify) \_\_\_\_\_

OPERATING SYSTEMS

☐ MVS/XA

☐ UNIX

☐ Other (Please specify) \_\_\_\_\_

OPERATOR TRAINING

☐ Operating Training





## ANALYSIS AND DESIGN

☐ Structured Analysis and Design

## DATABASE DESIGN

☐ Introduction to Database Design

☐ Logical Database Design

☐ IMS

☐ IDMS/R

## INTRODUCTION TO TELECOMMUNICATIONS

☐ Networks

☐ Protocols

## TELEPROCESSING

☐ CICS-DL/I

## MANAGER TRAINING

☐ DP Manager Training

☐ DP Project Management

☐ Non-DP Manager (End-User) Training

## INFORMATION CENTER

☐ Information Center Concepts

☐ Decision Support Systems

☐ Fourth Generation Languages

☐ Expert Systems

☐ Other (Please Specify) \_\_\_\_\_

## OTHER COURSES (Please Specify)

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## ON-SITE PRODUCT CUSTOMIZATION OPTIONS

### INSTRUCTIONS

- Each training department has unique needs that may require on-site customization of the interactive video product available from Interactive Training Systems (ITS). Different levels of customization could be made available to you so that your company could tailor each product to meet your specific needs. Obviously, each additional level of customization would add some expense to ITS for which they would expect to be compensated.
- Several possible levels of customization are listed below. For each level, please indicate the extent to which that capability increases the value of the product. That is, how much more, if any, would you be willing to pay ITS to have this capability?



ON-SITE CUSTOMIZATION  
CAPABILITY

HOW IMPORTANT IS IT  
TO HAVE THIS CAPABILITY?  
(1 = VERY IMPORTANT  
4 = NOT IMPORTANT).

INDICATE THE MAXIMUM  
OVER THE BASE PRICE  
YOU WOULD SPEND FOR  
THIS CAPABILITY.

- A. Ability to by-pass or  
resequence video segments \_\_\_\_\_ %
- B. Ability to add or delete computer  
graphics or text screens \_\_\_\_\_ %
- C. Ability to define interactive  
branching with existing video \_\_\_\_\_ %
- D. Ability to define branching  
with new video \_\_\_\_\_ %
- E. What other level of customization  
would you like?

Please specify:

\_\_\_\_\_ %

\_\_\_\_\_ %

\_\_\_\_\_ %



## INFORMATION ON STUDENTS' RESULTS

### INSTRUCTIONS: Part I

ITS' interactive video training system is capable of producing a variety of performance assessment measures.

- Before taking a course what information regarding a student's course assessment should be presented to the student? Please check all that apply.

\_\_\_ A list of the performance assessments the system will generate.

\_\_\_ The individuals who will have access to this information.

\_\_\_ The conditions under which these individuals will get this information.

\_\_\_ The responsibilities of management regarding use of this information.

\_\_\_ How this information will be used for employee evaluation.

### INSTRUCTIONS: PART II

- The grid below lists the types of information available on each student's performance in each module, units of instruction, the company personnel that could have access to this information, and the units of the instruction at which this information could be aggregated.

We want to determine what information should be available, who should have access to that information, and at what units of aggregated. Please check each item that represents a desirable feature.





PERFORMANCE INFORMATION	AVAILABLE TO:	AT THIS UNIT OF INSTRUCTION				
		SINGLE SESSION	SINGLE MODULE	SINGLE COURSE	RELATED COURSE	CURRICULUM
Placement Score						
Items Correct:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Objectives Mastered:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Lesson Exercises						
Trials:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Items Completed:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Items Correct:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Time to Complete:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____



PERFORMANCE INFORMATION	AVAILABLE TO:	AT THIS UNIT OF INSTRUCTION				
		SINGLE SESSION	SINGLE MODULE	SINGLE COURSE	RELATED COURSE	CURRICULUM
Mastery Test						
Pass/Fail						
Analysis:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Objective Mastery						
Analysis:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____
Item Mastery						
Analysis:						
	Student:	_____	_____	_____	_____	_____
	Instructor:	_____	_____	_____	_____	_____
	Employer:	_____	_____	_____	_____	_____



INSTRUCTIONS: Part III

- Performance assessment information could also be aggregated across students for instructional planning and analysis. The grid below lists possible performance information and types of comparisons that might be performed on this information. Please review these options carefully and check each item that represents a desirable feature.

<u>PERFORMANCE INFORMATION</u> <u>(PER MODULE)</u>	<u>COMPARE STUDENTS'</u> <u>PERFORMANCE</u>	<u>ANALYZE</u> <u>ITEM</u>
Placement Score		
Number of Items Correct	_____	_____
Objectives Mastered	_____	_____
Exercises		
Number Completed	_____	_____
Time to Complete	_____	_____
Number of Trials	_____	_____
Number of Correct	_____	_____
Mastery Test		
Pass/Fail Only	_____	_____
Objective Mastery Analysis	_____	_____
Item Mastery Analysis	_____	_____



## PROJECT WORK STATEMENT

## DISTRIBUTION

TITLE MARKET ASSESSMENT OF INTERACTIVE VIDEOCLIENT Interactive Training SystemsCONTRACT: ATTACHED \_\_\_\_\_ TO FOLLOW \_\_\_\_\_ LETTER \_\_\_\_\_ VERBAL XPROJECT LEADER R. Peterson PROJECT CODE YAIVDATE STARTED 9/19/83 PLANNED COMPLETION DATE 10/14/83LEVEL OF EFFORT(Professional Man Days) 12

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9/22/83  
Date TypedTOTAL CONTRACT VALUE: \$ or £ \$14,500.00REVENUE DISTRIBUTION (% or \$) INPUT US 100% INPUT LTD \_\_\_\_\_

REIMBURSABLE EXPENSES: NO \_\_\_\_\_

YES XEXP. BUDGET Up to 25% TO COVER: TRAV: XTELE: X

RPT. PREP.: \_\_\_\_\_

OTHER: XBILLING SCHEDULE DESCRIPTION 50% on authorization50% on completionPROJECT DESCRIPTION Interview most likely prospects for interest  
in an interactive video approach to data processing training.INDICATE TYPE OF WORK: REPORT X PRESENTATION XTHANK YOU PACKAGE: YES \_\_\_\_\_ NO XACCOUNTING USE ONLY: ENTERED ON CURRENT PROJECT LIST ✓

INPUT





Interactive Training  
Demonstration/Interview Protocol  
October 3, 1983

I. Introductions (INPUT)

A. Opening Remarks

1. Welcome/Thank you
2. Purpose
  - a. Demonstrate interactive training product.
  - b. Solicit reactions vis-a-vis your company needs.
3. Background
  - a. Technological advances brought the need for training.
    1. Stand-up trainers were a good first solution.
    2. But as the number of students increased and the issues became more complex, trainers couldn't tailor courses to the local needs and couldn't give students the individual attention needed to comprehend material.
    3. Each solution only addressed part of the problem.
      - a. CBT (IIS or Phoenix) provided some tailoring and management of student training but didn't allow the necessary video component.
      - b. Video-based training offered the necessary "live" instruction but sacrificed control.
    4. Best solution is combination of video and computer. Students actively participate and control their learning.
4. Client and INPUT
  - a. Client background.
    1. Custom Training.
    2. Development of training system product.
    3. Interest in assessing opportunities in dp training.
  - b. INPUT's role.
    1. Objective, independent analysis.
    2. Procedure: show product, get your evaluation, report results, make recommendations.



## 5. Ground Rules

### a. INPUT

1. Information is confidential.
2. Individual respondents anonymous.

### b. Respondents

1. Objective analysis.
2. Careful analysis of issues.

## B. Respondent Identification

### 1. Name.

### 2. Title.

### 3. Responsibilities.

### 4. Involvement in training decisions.

### 5. Size of dp training; budget; number of students; percent of IS budget?

## II. DEMONSTRATION

### A. Introduction

#### 1. Hardware

- a. Personal computer.
- b. Color monitor.
- c. Videocassette or videodisc player.
- d. Controller - interface between computer and video source.
- e. Special software.

#### 2. Spectrum of capabilities

- a. UNIX.
- b. Flight simulation.
- c. Look at capability and content.

#### 3. Procedure

- a. View demonstration, asking questions about the product.
- b. After demo will discuss the potential of this type of product to meet your training needs.



B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

III. Interview

A. General Reactions

1. What is your overall impression of the product?
  - a. How much of the necessary interactivity does it provide?
  - b. How much of the necessary control does it provide management and student?
  - c. How tailorable does the system seem to be?
  - d. How "engaging" does it appear?
2. Does this approach represent a "quantum leap" in training technology?
  - a. Why or why not?
  - b. What is needed to make it more of a leap?

B. What advantages (and then disadvantages) do you see in comparing this approach to:

1. Live instruction.
  - a. with in-house instructors?
  - b. with outside instructors?
  - c. Outside courses/seminars?
2. Video training?
3. Other CBT using terminals tied to a mainframe?

C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)?
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?



- D. What other concerns do you have of the product?
1. Management system?
  2. Cost/benefit data?
  3. Proof of effectiveness?
  4. Size of library?
  5. Others?
- E. How would you use this system?
1. Addition to current training or replacement?
  2. What types of training would you use this with?
    - a. Basic conceptual?
    - b. Procedural?
    - c. Highly complex?
- F. In which course areas would this system provide the maximum benefit?
1. Introductory courses?
  2. User training, including PC literacy?
  3. Programming?
  4. Logical database design?
  5. Systems analysis and design?
  6. Project management?
  7. Others?
- G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.
1. What costs/student hour do you have for
    - a. Live (\$40 is a good average for fully burdened)
    - b. Video (\$5)
  2. Given these figures, what would you expect to pay per hour of instruction?
  3. What would you be willing to pay?
  4. If video modules average \$60/module month, how much would you be willing to spend on this product?
  5. How much do you spend on 1 course?
    - a. Number of modules in course (M).
    - b. Number of days in course (D).
    - c. Number of classes per year (Y).





- d.  $\text{Total \$ / years} = M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc?
- 2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?
    - One station?
    - Learning Center with \_\_\_\_\_ stations.
    - Local network.
    - Distributed network with mainframe interface.
- 3. Other training uses.

##### B. May I answer any questions for you?

- 1. When will the courseware be available? (List)
- 2. How much will it cost?
- 3. What courses will be available? (List and then research)
- 4. How does it differ from brand X?
- 5. Why is it so expensive?
- 6. What evidence is there that it's more effective?
- 7. What other training areas will be covered? When?
- 8. What is the identify of the vendor?
  - a. Name?
  - b. Background?

##### C. Thank You!



INPUT

ORDER/INVOICE/FULFILLMENT

ORIGINATOR (SIGNATURE) [Signature]PREPARED BY: R. PetersonDATE: 9/19/83

ACTIVITY	<input checked="" type="checkbox"/> NEW ORDER	<input type="checkbox"/> FULFILLMENT ONLY	COMMISSION TO:	SOLD BY:	APPROVED	
	<input type="checkbox"/> CONTINUATION	<input type="checkbox"/> SINGLE INVOICING		<u>BLP</u> 60%		<u>EM</u> INITIAL <u>9/19/83</u> DATE
	<input type="checkbox"/> CHANGE	<input checked="" type="checkbox"/> MULTI-INVOICING		<u>TOF</u> 40%		
	<input type="checkbox"/> CANCEL	NO. INVOICES <u>2</u>		%		
	<input type="checkbox"/> SPECIAL:	<input type="checkbox"/> PENDING:		%		

PRODUCT	<input checked="" type="checkbox"/> SUBSCRIPTION	US <input checked="" type="checkbox"/> PROJ. I.D./YEAR	TITLE OR DESCRIPTION	AMOUNT
	<input checked="" type="checkbox"/> CUSTOM	<u>US</u> <u>YATZ/83</u>	<u>Interactive Video Assessment</u>	<u>\$14,500</u>
	<input type="checkbox"/> MULTICLIENT			
	<input type="checkbox"/> REPORTS			
	<input type="checkbox"/> COPIES			
	<input type="checkbox"/> CONSULT/PRESENT.			
<input type="checkbox"/> TAPES/MATERIALS				
<input type="checkbox"/> REIMBURSED COSTS				

CLIENT AUTH. P.O. # 830 5616 INPUT CONTRACT ☐ LETTER ☐ VERBAL ☒

ATTACH ALL AUTHORIZING DOCUMENTS TO WHITE (CONTRACT) COPY. CONTRACT TO FOLLOW

INVOICE	SHIP TO:	INVOICE TO: (IF DIFFERENT)
	NAME <u>Mr. John Shackleton</u>	NAME <u>Same</u>
	TITLE <u>Director, DP Product</u>	TITLE _____
	COMPANY <u>Interactive Training Sys</u>	COMPANY _____
	ADDRESS <u>4 Cambridge Center</u>	ADDRESS _____
	<u>Cambridge, MA 02142</u>	_____
PHONE <u>(617) 497-6100</u>	PHONE ( ) _____	

\* ☐ Check here if more than one shipping address and attach names and addresses to green (fulfillment) copy. \* ☐ Check here for address change to mail list.

INVOICE TO READ: (FOR OTHER THAN STANDARD WORDING)

SPECIAL INSTRUCTIONS FOR HANDLING, BILLING, STAGGERED OR DELAYED PAYMENTS, ETC.

Billing for 1st half (\$7,250) can proceed.

O.I.F. ONLY	INV. COMP.	BY:	DATE:	CLIENT #:	ORDER #:	INV. #:	MULTI-INVOICING
	OF _____						

ORIGINATOR/SHIPPING FULFILLMENT	ITEM DESCRIPTION OR TITLE	NO.	BY	DATE	ITEM DESCRIPTION OR TITLE	NO.	BY	DATE

FULFILLMENT TO BE COMPLETED IN: ☒ PALO ALTO ☐ LONDON ☐ OTHER \_\_\_\_\_

• WHITE - CONTRACT • GREEN - FULFILLMENT • YELLOW - INVOICE • PINK - ORIGINATOR

• GOLDENROD - REGIONAL SALES MANAGER

R 1/81



TITLE Market Assessment of Interactive Video

CLIENT Interactive Training Systems

CONTRACT: ATTACHED \_\_\_\_\_ TO FOLLOW \_\_\_\_\_ LETTER \_\_\_\_\_ VERBAL X

PROJECT LEADER Peterson CODE \_\_\_\_\_

DATE STARTED 9/19/83 PLANNED COMPLETION DATE 10/14/83

LEVEL OF EFFORT (Professional Man Days) 12

TOTAL CONTRACT VALUE: \$ 14,500

REVENUE DISTRIBUTION (% or \$) INPUT US 100 INPUT LTD \_\_\_\_\_

REIMBURSABLE EXPENSES: NO \_\_\_\_\_

YES X

EXP. BUDGET up to 25% TO COVER: TRAV: X

TEL: X

RPT. PREP.: \_\_\_\_\_

OTHER: X

BILLING SCHEDULE DESCRIPTION 50% on authorization

50% on completion

PROJECT DESCRIPTION Interview most likely

proposes for an interesting

to date processing training

INDICATE TYPE OF CUSTOM WORK: REPORT X PRESENTATION X

THANK YOU PACKAGE: YES \_\_\_\_\_ NO X



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YATZ

PROJECT LEADER: \_\_\_\_\_

DATE: 19 Sept '83

CORPORATE/WEEK ENDING

September

October

[illegible]





TITLE Market Assessment of Interactive Video

CLIENT Interactive Training Systems

CONTRACT: ATTACHED ☐ TO FOLLOW ☐ LETTER ☐ VERBAL ☒

PROJECT LEADER Peterson CODE ☐

DATE STARTED 9/19/83 PLANNED COMPLETION DATE 10/14/83

LEVEL OF EFFORT (Professional Man Days) 12

TOTAL CONTRACT VALUE: \$ 14,500

REVENUE DISTRIBUTION (% or \$) INPUT US 100% INPUT LTD ☐

REIMBURSABLE EXPENSES: NO ☐

YES ☒

EXP. BUDGET upto 25%

TO COVER: TRAV: ☒

TEL: ☒

RPT. PREP.: ☒

OTHER: ☒

BILLING SCHEDULE DESCRIPTION 50% on authorization

50% on completion

PROJECT DESCRIPTION Interview most likely

prompts for <sup>interest in</sup> an interactive video approach  
to data processing training

INDICATE TYPE OF CUSTOM WORK: REPORT ☒ PRESENTATION ☒

THANK YOU PACKAGE: YES ☐ NO ☒



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YATZ

PROJECT LEADER: \_\_\_\_\_

DATE: 19 Sept '83

September

October

이것이 바로 '가짜 뉴스'의 본질이다.

[illegible]



TITLE Market Assessment of Interactive Video

CLIENT Interactive Training Systems

CONTRACT: ATTACHED \_\_\_\_\_ TO FOLLOW \_\_\_\_\_ LETTER \_\_\_\_\_ VERBAL X

PROJECT LEADER Peterson CODE \_\_\_\_\_

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REIMBURSABLE EXPENSES: NO \_\_\_\_\_

YES X

EXP. BUDGET up to 25% TO COVER: TRAV: X

TEL: X

RPT. PREP.: \_\_\_\_\_

OTHER: X

BILLING SCHEDULE DESCRIPTION 50% on authorization

50% on completion

PROJECT DESCRIPTION Interview most likely

prompts for <sup>interesting</sup> an interactive video approach  
to data processing training

INDICATE TYPE OF CUSTOM WORK: REPORT X PRESENTATION X

THANK YOU PACKAGE: YES \_\_\_\_\_ NO X



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

SUBJECT: YAIZ

SUBJECT LEADER: \_\_\_\_\_

DATE: 19 Sept '83

CORPORATE/WEEK ENDING

September

October

[illegible]





INPUT

## ORDER/INVOICE/FULFILLMENT

ORIGINATOR (SIGNATURE) [Signature] PREPARED BY: R. P. [Signature] DATE: 9/19/53

ACTIVITY	<input checked="" type="checkbox"/> NEW ORDER	<input type="checkbox"/> FULFILLMENT ONLY	COMMISSION TO:	SOLD BY:	APPROVED
	<input type="checkbox"/> CONTINUATION	<input type="checkbox"/> SINGLE INVOICING	_____ %	<u>ALP 60</u> %	
	<input type="checkbox"/> CHANGE	<input checked="" type="checkbox"/> MULTI-INVOICING	_____ %	<u>TOF 40</u> %	
	<input type="checkbox"/> CANCEL	<input type="checkbox"/> NO. INVOICES <u>2</u>	_____ %	_____ %	
	<input type="checkbox"/> SPECIAL:	<input type="checkbox"/> PENDING:	_____ %	_____ %	

PRODUCT	<input type="checkbox"/> SUBSCRIPTION	US <input checked="" type="checkbox"/> PROJ. ID/YEAR	TITLE OR DESCRIPTION	DATE
	<input checked="" type="checkbox"/> CUSTOM	<u>US</u>	<u>IAIZ/83</u>	<u>Interactive Video Assessment</u>
	<input type="checkbox"/> MULTICLIENT			<u>\$14,500</u>
	<input type="checkbox"/> REPORTS			
	<input type="checkbox"/> COPIES			
	<input type="checkbox"/> CONSULT/PRESENT.			
<input type="checkbox"/> TAPES/MATERIALS				
<input type="checkbox"/> REIMBURSED COSTS				

CLIENT AUTH.	P.O. # <u>830561p</u>	INPUT CONTRACT <input type="checkbox"/>	LETTER <input type="checkbox"/>	VERBAL <input checked="" type="checkbox"/>
	ATTACH ALL AUTHORIZING DOCUMENTS TO WHITE (CONTRACT) COPY.			

ORIGINATOR	SHIP TO:	INVOICE TO: (IF DIFFERENT)
	NAME <u>Mr. John Shackleton</u>	NAME <u>Same</u>
	TITLE <u>Director, DP Product</u>	TITLE _____
	COMPANY <u>Interactive Training Sys</u>	COMPANY _____
	ADDRESS <u>4 Cambridge Center</u>	ADDRESS _____
	<u>Cambridge, MA 02142</u>	_____
PHONE <u>(617) 497-6100</u>	PHONE ( ) _____	

INVOICE	* <input type="checkbox"/> Check here if more than one shipping address and attach names and addresses to green (fulfillment) copy.	* <input type="checkbox"/> Check here for address change to mail list.
---------	---	--

INVOICE TO READ: (FOR OTHER THAN STANDARD WORDING)
SPECIAL INSTRUCTIONS FOR HANDLING, BILLING, STAGGERED OR DELAYED PAYMENTS, ETC.

O.I.F. ONLY	INV. COMP.	BY:	DATE:	CLIENT #:	ORDER #:	INV. #:	MULTI-INVOICING
							OF _____

ORIGINATOR/SHIPPING	FULFILLMENT	ITEM DESCRIPTION OR TITLE	NO.	BY	DATE	ITEM DESCRIPTION OR TITLE	NO.	BY	DATE	

FULFILLMENT TO BE COMPLETED IN: ☒ PALO ALTO ☐ LONDON ☐ OTHER \_\_\_\_\_



## FEES

INPUT's professional fees for this engagement as described in this proposal are as follows (fees for phases 1B and 2 are for planning purposes, contingent on experience gained in Phase 1A):

- Phase 1A - \$14,500 Plus Expenses
- Phase 1B - \$21,500 Plus Expenses
- Phase 2 - \$17,500 Plus Expenses
- Phase 3 - \$ 9,500 Plus Expenses
- Considering the necessity for on-site interviews it is likely that the out-of-pocket expenses (travel, telephone, production, etc.) will add approximately 25 percent to the professional fee for Phase 1A and 1B. Out-of-pocket expenses for Phase 2 and 3 will be estimated before the award. All expenses are, of course, documented and charged at cost.
- One-half of the professional fee for each phase or subphase is due and payable upon authorization of that phase. The remainder of the fee plus any out-of-pocket expenses incurred will be billed at the conclusion of that phase.
- This proposal remains in effect until September 30, 1983.

## CONCLUSION

INPUT believes it is extremely well qualified by prior experience to execute this challenging assignment in a meaningful and cost-effective manner. Your confidence in us will be well rewarded.

To facilitate authorization, please complete the signature block below and return to INPUT.

AUTHORIZATION: INTERACTIVE TRAINING  
SYSTEMS, INC.

ACCEPTED BY: INPUT

NAME

NAME

TITLE

TITLE

DATE

DATE

INPUT



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YITS/Phase 1A

DATE: 2 Sept. 1983

PROJECT LEADER: RLP/TOS

Sept

October

November

CORPORATE/WEEK ENDING

[illegible]



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

September 2, 1983

Mr. John Shackleton  
Director, DP Product  
Interactive Training Systems, Inc.  
4 Cambridge, MA 02142

Dear John:

Tom O'Flaherty and I were very stimulated by our meeting with you and other members of ITS management last Tuesday. We believe that ITS has the product delivery system and the management strength to capture a significant share of the growing interactive video training market. And, we are pleased that you are considering INPUT as an important source of professional market intelligence on which you will base many of your new business decisions and strategies.

INPUT is pleased to submit the enclosed proposal for custom market research on behalf of ITS. We believe this proposal, based largely on our conversations of August 30 and on our experiences with similar research projects, is responsive to your research needs. However, we welcome the opportunity to adapt the proposed workscope to more closely reflect your concerns should that be required.

If you have any questions or need clarification on any of the proposal items, please telephone me. Otherwise, we will leave this proposal open until September 30, 1983 to provide you ample time to review its contents.

Again, John, we extend our thanks to you and your colleagues at ITS for providing an exciting visit and challenging opportunity.

Sincerely,



Richard L. Peterson  
Senior Consultant



Thomas O'Flaherty  
Principal Consultant

RLP/TOF/lcg  
Enclosure  
cc: Ed Metz





PROPOSAL

MARKET ASSESSMENT  
OF  
INTERACTIVE VIDEO TRAINING  
IN THE  
DATA PROCESSING MARKETPLACE

FOR

INTERACTIVE TRAINING SYSTEMS, INC.  
CAMBRIDGE, MA

FROM

INPUT, INC.  
PARK 80 PLAZA WEST ONE  
SADDLE BROOK, NJ 07662

SEPTEMBER 2, 1983

INPUT



## INTRODUCTION

In this proposal INPUT sets forth its methods, schedules, and professional fees to conduct market research on interactive video training products in the data processing training marketplace.

This proposal is based on INPUT's understanding of ITS' pending business strategy decisions that this new intelligence is intended to support and on our experiences with interviews (over 12,000 annually) in support of hundreds of projects of a similar nature in our nine-year history. INPUT believes this proposal to be in keeping with your information needs but welcomes the opportunity to modify these specifications to better serve you should that be necessary.

## UNDERSTANDING

Interactive Training Systems has been engaged in the business of custom training product development since its inception in 1981. Use of state-of-the-art technologies in microcomputing and video permits ITS to produce some of the most sophisticated interactive video training available.

ITS is planning to expand this business base to include the development and marketing of interactive video training products for sale through its own sales network. The product line targeted for this new launch is data processing training. ITS is already in the process of developing UNIX modules and is considering the development of courses in logical data base design and IMS training. With success in these first starts, ITS intends to add to these offerings in data processing as well as expand into other disciplines such as engineering, insurance, and banking.

The financial and managerial risk associated with this new venture requires that ITS seek independent verification and expansion of non-UNIX data processing information in several key areas. INPUT has been requested to submit this proposal to support this requirement.

## SCOPE

In the course of the study the following issues should be addressed:

- Is there currently a sufficient market for interactive video training products among large, leading edge ("flagship") companies to support the costs of initial product development?
  - What companies are these?
  - What courseware do they require?
  - How strong is the need for training in logical DBMS?
  - What are the concerns regarding the course database philosophy and authorship?
  - For what other subjects is there high need?



- What are the conditions under which the ITS product could replace existing training in these content areas within these flagship companies?
- What are the characteristics of the longer-term market?
  - What is the size of the overall market growth rate?
  - What courses are required?
  - What are the attributions of companies that are likely to be customers? Non-customers?
  - What would have to change to make non-customers into good prospects?
    - Price declines?
    - Other vendor offerings?
    - Flagship examples?
    - Cost/benefits experience?
    - Greater exposure to product?
    - Larger library?
    - Second-generation products?
- What are pricing elasticities by...
  - Flagship vs non-flagship?
  - Degree of dedication to training by company?
  - Current training practices vs interactive?
  - Size of company, and IS departments?
  - By type of course?
  - By level of demonstrated or perceived benefits?
- What would be the acquisition process within a prospective customer organization?
  - Who (which titles) would make the recommendation?
  - Who would ultimately make the decision?
  - How long would the acquisition process take?



- Apart from pricing levels, what particular pricing terms would be most effective?
  - Bundled hardware and software vs unbundled?
  - Discounts for multiple copies/sites?
  - Usage vs module pricing?
- Would the ITS product increase the overall size of the DP training market, or would ITS' market share have to come out of existing vendors' shares?

## PROPOSED METHODOLOGY

INPUT believes that the most meaningful information for decision making will result from a phased approach to the proposed research. The specification for each phase after the first will be based on the results of the previous phase of research. In this way ITS will have the additional advantage of committing funds based on the usefulness of the information from the previous phase and on the avenues of opportunity the research results open or close.

Specifically, INPUT proposes that the following research phases be conducted:

- Phase 1: Interview the most likely flagship prospects to assess their willingness to commit to this interactive video approach to data processing training. (It would not be possible to project general market size of receptiveness based on this phase's research.) This phase would be further divided into Phases 1A and 1B:
  - Phase 1A would interview 7 companies to ascertain their receptiveness. If there was overwhelming response one way or the other, interviewing would go no further, otherwise Phase 1B would be conducted.
  - Phase 1B would interview 13 additional companies.
- Phase 2: Interview approximately 100 additional companies, selected at random to identify general interest levels, perceived value, key course areas, market size, etc.
- Phase 3 - This phase would be a market scan that would identify the number, size and identity of sites with IMS installed. It would take place during or after Phase 1A.
- The tasks to be completed by INPUT in each of these phases is described below. Since phases 1B and 2 are partially dependent on and subject to the results of the previous phase(s), it is likely that the specifications for some of these phases will be altered from those listed below. INPUT will, therefore, provide ITS with an update of the proposed specifications prior to conducting each of these phases.





## A. PHASE ONE

- On-site demonstrations of ITS' interactive video capabilities as captured in the UNIX prototype course will be provided to key representatives of selected companies. One demonstration per day will be scheduled to allow time for equipment transportation and set up, scheduling difficulties, etc.

- INPUT, with information from ITS and INPUT's own intelligence, will develop criteria on which to select key prospects for the proposed product.
- A final list of companies to be contacted will be developed. That list, most of which will be derived from ITS' contact files, currently includes:

AT&T	Bell Labs
Mobil Oil	CitiCorp
Allstate	Standard Oil of Indiana
Exxon	GTE (Tampa)
ITT (Stafford, CT)	Aetna
Western Electric	Kemper
J.C. Penney	Bank of America
American Express	IBM (Systems Research)
EDS	Federal Gov't (IRS, DOD, Federal Reserve)
Bechtel	Aramco
Hartford Insurance	Blue Cross/Blue Shield

- INPUT will arrange an appointment for an audience with company representatives targetted to include:

MIS Vice President/Director  
Director of Systems and Programming  
Director of Operations  
EDP and Corporate Training Director  
Vice President of Personnel

- INPUT will consult with the ITS staff person conducting the demonstration to develop scenarios of the demonstration/interview that will both present the product positively and facilitate the objective interviewing to follow.



- A senior INPUT consultant will conduct a group interview of the company representatives after the demonstration. The purpose of the interview will be to determine interest, acceptance, concerns, perceived value, etc. of this interactive video approach to data processing. Such protocols will be carefully crafted to elicit a maximum amount of detailed information on the issues.
- Analyses of these interview results will be presented to ITS in both oral and written form. The focus of the report will be on the explanation of information that addresses the viability of this new business and the issues, if any, that impede a firm "go/no go" decision.
  - Information will be presented on the prospects, their level of interest, and concerns.
  - Hypotheses for entry and pricing strategies to be tested in Phase Two will be presented at the conclusion of this phase.

## B. PHASE TWO

- The Phase One effort will lead to an identification of some indication of market segmentation characteristics of good prospects. To confirm these characteristics and to qualify additional prospects are the goals of Phase Two.
- Interviews of approximately 100 additional companies will be completed.
  - INPUT, with assistance from ITS, will develop a pool of "Second Level" prospects.
  - Company training representative will be invited to attend one of eight group demonstrations/interviews in two or three metropolitan areas.
  - After a group demonstration a questionnaire, developed by INPUT and reviewed by ITS, will be used to elicit responses from key decision makers in each company.
    - The results will include a description of key market segmentation characteristics and confirmation of entry and pricing strategies.
    - An additional list of "qualified" prospects will be available.
  - The results of these interviews will be summarized and presented to ITS.
  - Follow-up telephone interviews will be conducted as necessary.



### C. PHASE THREE

- The tasks associated with this phase of the research are designed to help ITS make a determination on the sales potential of an interactive course on IMS.
  - Secondary research will be used to identify sites that have IMS installed and meet many of the general characteristics of good prospects as identified in Phase I.
  - INPUT will design a telephone interview protocol to establish general relationships between installation size and IMS training requirements, unmet training needs, etc. This protocol will be submitted to ITS for review and approval before interviews are conducted.
  - INPUT will contact a knowledgeable representative in approximately 25 companies and conduct a telephone interview with them.
- This information will be summarized and presented to ITS.
  - The focus will be on determining the likely potential market for an interactive video product.
  - Forecasts of market size vis-a-vis pricing strategies will be presented.
  - Additional sales leads will be identified.

### SCHEDULE

- We believe the following schedule is reasonable although the completion time, particularly for Phase I, is very dependent on companies' availability for interviews.
- Week 1:
  - Companies identified and initial contact made.
  - Demonstration/interviews scheduled.
  - Interview protocols and demonstration scenarios established.
- Week 2: 7/26
  - Conduct demonstration/interviews (Phase IA).
- Week 3:
  - Complete Phase IA interviews.
  - Complete data analysis.



- Week 4:
  - Present results of Phase 1A.
  - Schedule Phase 1B interviews
- Weeks 5 and 6:
  - Conduct Phase 1B demonstration/interviews.
- Week 7:
  - Complete data analysis.
- Week 8:
  - Present results of Phase 1B.
- Week 9:
  - Identify additional prospects (Phase 2).
  - Develop protocol (Phase 2).
  - Identify IMS installations (Phase 3).
- Week 10:
  - Interview prospects (Phase 2)
  - Interview IMS sites (Phase 3).
- Week 11:
  - Present results of Phase 2.
  - Present results of Phase 3.





## FEES

INPUT's professional fees for this engagement as described in this proposal are as follows (fees for phases 1B and 2 are for planning purposes, contingent on experience gained in Phase 1A):

- Phase 1A - \$14,500 Plus Expenses
- Phase 1B - \$21,500 Plus Expenses
- Phase 2 - \$17,500 Plus Expenses
- Phase 3 - \$ 9,500 Plus Expenses
- Considering the necessity for on-site interviews it is likely that the out-of-pocket expenses (travel, telephone, production, etc.) will add approximately 25 percent to the professional fee for Phase 1A and 1B. Out-of-pocket expenses for Phase 2 and 3 will be estimated before the award. All expenses are, of course, documented and charged at cost.
- One-half of the professional fee for each phase or subphase is due and payable upon authorization of that phase. The remainder of the fee plus any out-of-pocket expenses incurred will be billed at the conclusion of that phase.
- This proposal remains in effect until September 30, 1983.

## CONCLUSION

INPUT believes it is extremely well qualified by prior experience to execute this challenging assignment in a meaningful and cost-effective manner. Your confidence in us will be well rewarded.

To facilitate authorization, please complete the signature block below and return to INPUT.

AUTHORIZATION: INTERACTIVE TRAINING  
SYSTEMS, INC.

ACCEPTED BY: INPUT

\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YITS/Phase 2

DATE: 2 Sept 1983

PROJECT LEADER: RLP/TOF

CORPORATE/WEEK ENDING

Sgt  
HLLV

Oct  
~~AUGUST~~

~~SEPTEMBER~~

[illegible]



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YITS/Phase 1B

DATE: 2 Sept 1983

PROJECT LEADER: RL/TOF

CORPORATE/WEEK ENDING

September  
~~JULY~~

AUGUST

November  
~~SEPTEMBER~~

[illegible]



## 1983 QUARTERLY SCHEDULING PLAN (Q3)

PROJECT: YITS/Phase 3

DATE: 2 Sept 1983

PROJECT LEADER: RLP/TOF

CORPORATE/WEEK ENDING

Sept  
JULY

Oct  
~~AUGUST~~

Nov  
~~SEPTEMBER~~

[illegible]





T+  
INPUT SARK

INPUT MNTV  
NOVEMBER 4, 1983

TO: RICH PETERSON  
FM: RENEE FENSTERMAKER

RE: YAIV NEED APPROVAL OF EXPENSES FOR FINAL BILLING

TRAVEL \$ 568.92  
COPIES 21.50  
SECRETARIAL 200.00 - 10 hrs  
POSTAGE .40

TOTAL 790.82

REGARDS.

OK 11/7



YAIU

9/29

AT&T

Contact: Robert Shaw (Training Dir)

He is checking around for DPT Corp people and will call back

Call

Bell Labs

Contact: Jack Giphens (DP Dir)

\* Dan Cleighorn, Traing Dir  
Comp. to Watson Elec Sys  
authoring lang in UNIX

Presented to Service Side

ref me to C.F. Simone in Piscataway  
(This may or may not be separate from Shaw's AT&T office)

NYC  
10:00  
10/14

Blue Cross/Blue Shield NYC

Contact: Geri Riegger (UP, DP)

ref me to Jack O'Connor (Mgr, Training & Ed.)

Blue Cross NE Ohio

Contact: Anthony Gambatese (UP, DP)

ref me to Gary Livingston (Training Coord)

scheduled

{ Blue Cross Greater Philadelphia

Contact: Glenn Breen (Sen Dir Systems)

ref me to Joe McNally (Security & Control Analyst)

reject

{ Bendix

Contact: Jean-claude Vernieres (MFS Ex Dir) Dave Benonardi

Augusta, GA

Dupont

Contact: Robert Luft (Gen Mgr, Info Syst)

ref me to Roger Wilke (Train. Dir)

Exxon

Contact Mr. Nobel (UP Comp Sci)

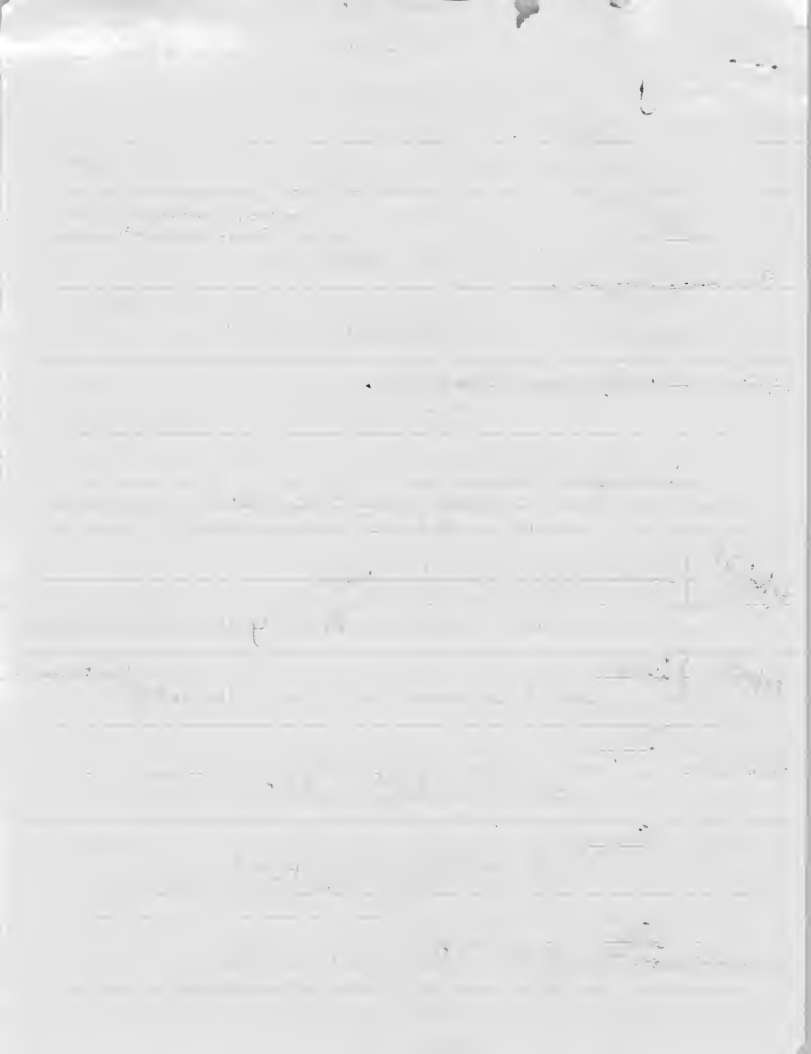
ref me to Keith Keibel (Dir Mgr, Training)

GE

Comm at Bridgeport Dan

Madden (Mgr, Corp Info Sys)

Ref to Dan Pellei (Ed & Training)



YAZU

rejected { Hartford Insurance  
Contact: David Berg (UP, DP)  
Ref to Bill Sebrell (Dir Corp Education)

IBM  
Contact: Mr Heaton (Dir, Info Syst) <sup>Bob D. Siz</sup>  
Ref to Art Pickard (PCs) + Jack Murray (Training) <sup>Dir, 3rd Floor</sup>

Merrill Lynch  
Chicago  
contact Joseph Castellano (UP, Corp Systems)  
Ref to Church DeVito (DP Training)

Mobil  
Haverhill (Engineer) Contact: Bill Flock (M75 Mgr)  
Ref to Dave Hunt (DP Training)

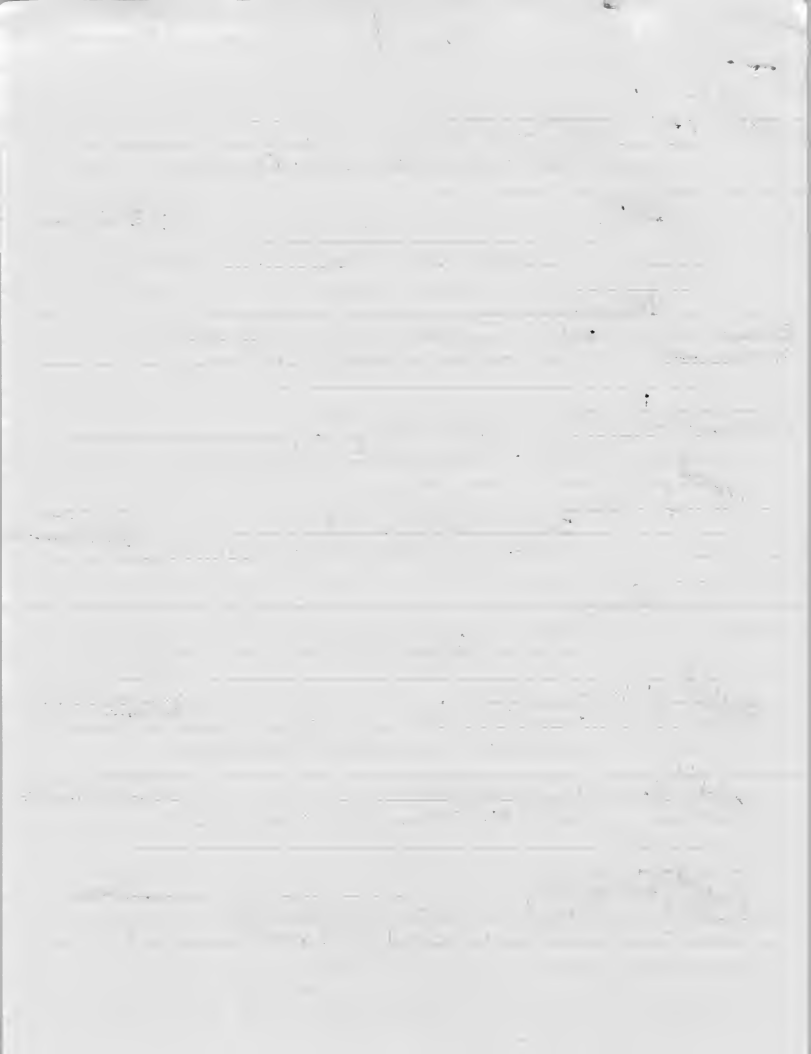
rejected { Penny  
Contact John Dratch (DP Mgr)  
Ref to Maureen Garzo (Corp Training) <sup>DP Training was in contact</sup>

Sears  
Contact: Charles Carlson (UP, DP)  
Ref to Teddy Wolfhouser (Corp Training)

Scheduled { Western Electric  
Contact: H.R. Jester (Genl Mgr Comp Syst) <sup>Unix dp training discussion</sup>  
Ref to Judy Gordon (Dep. Chief)

Scheduled { United Technologies  
Contact: John Bennett (Dir, DP) <sup>did presentation 5/83</sup>

Scheduled { Citibank  
Contact: Victor Zurlo (AUP, DP) <sup>George Shore</sup>  
Ref to Ginny Pennell (AUP, Corp Training)



Company Information  
Headquarters Address

Divisions/Companies

No. Employees

No. DP Employees

Main DP CPUs

Database Software

Operating Env. (IMS, etc)

No. EDP Training Sites

Personnel Information

Name

Title

Location

Phone

(for)

MIS VP/Director

Dir. of Sys. & Programming

Director of Operations

EDP Training Dir.

Corporate Training Dir.

VP of Personnel

COMPANIES

Contact

AT&T

Bob Shaw  
AT&T Training

Exxon

Nobel (VP, DP)  
→ Keith Keibel Training DP

Mobil Oil

Jo McLaughlin →  
Bill Flock

Western Electric

Judy Gordon

JC Penneys

rejected  
Sub training

IBM

Heaton → Hornum →  
Art Pickard / Murrey

Bell Labs

Client ~~not~~

City Corp

Contact - ~~not~~

General Electric

Conf. dir. ~~not~~  
Dan Pelley (Trin)

United Technologies

Bennett ~~not~~

Blue Cross/Blue Shield

see below

Hartford Ins.

Hasseen

Merrill Lynch

Chuck Delitto

Bendix

Walt → Wilkes ~~not~~  
Fred Kirschman

Du Pont

Judy Wolfhouser

Sears Roebuck

BC/BS NY City

Geri Riegger  
AUP DP

BC Greater Phil.

Glen Breen  
Dir Systems

BC Ohio

Bob West →  
Gary Livingston

reject

DP Training  
Joel Giphens; C.F. Simone

Sam Cozzetto →  
Genny Pennell

Dan Madden DP →

Borg CDP →

reject





PROJECT: YAIW - INTERACTIVE CUSTOM  
 LEADER: PETERSON, RICH  
 PAGE 84

INPUT - USA  
 LABOR REPORT 1  
 WEEK: 46 ENDING 11-18-83

AUTHORIZED: 00-00-00  
 PLANNED COMPLETE: 00-00-00  
 PRINTED: 11/18/83 22:07:20

EMPLOYEE	WEEK		PLAN	PERSON MONTH				PROJECT			
	ACTUAL	ESHD		ACTUAL	ESHD	PLAN TD	PLAN	ACTUAL	ESHD	PLAN TD	PLAN
194 PETERSON, RICH	.3	.3		1.1	1.1			1.1	1.1		
162 TUTINO LAURA	.1			.1				.1			
RESEARCH	.5	.4		1.2	1.1			1.2	1.1		
PROJECT TOTAL	.5	.4		1.2	1.1			1.2	1.1		



PROJECT: YAIV - ASSESS. INTERACTIVE VIDEO  
LEADER: PETERSON, RICH  
PAGE 82

INPUT - USA  
LABOR REPORT 1  
WEEK: 45 ENDING 11-11-83

AUTHORIZED: 09-19-83  
PLANNED COMPLETE: 10-14-83  
PRINTED: 11/11/83 22:02:06

EMPLOYEE	WEEK		MONTH		PERSON		PROJECT	
	ACTUAL	ESMD	ACTUAL	ESMD	PLAN TD	PLAN	ACTUAL	ESMD
185 GALLI, LISA			.5	.1			.5	.1
184 KRETZHER, PATRICIA			.3	.1			.3	.1
SUPPORT			.8	.2			.8	.2
0 BUDGET								
140 BERNTSEN, ROBERT							5.7	2.8
100 O'FLAHERTY, TOM							1.0	1.0
194 PETERSON, RICH							6.8	6.8
RESEARCH							13.6	10.7
PROJECT TOTAL			.8	.2			14.5	11.0



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Ms. Judy Gordon  
Department Chief  
Alternate Delivery Systems  
Western Electric  
Corporate Education Center  
Hopewell, NJ 08525

Dear Ms. Gordon:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

Please express our sincere thanks to your colleagues for their participation and ensure them that their feedback has made a significant contribution to the future of this product.

Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: N.R. Jester, General Manager, Computer Systems



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Mr. Roger Brady  
Financial I.S. Manager  
United Technologies  
Hartford, CT 06101

Dear Mr. Brady:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

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Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg





# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Mr. John Bennett  
DP Director  
United Technologies  
Hartford, CT 06101

Dear Mr. Bennett:

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Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Ms. Jeannie Sayre  
Mobil Oil Corporation  
150 East 42nd Street  
New York, NY 10017

Dear Ms. Sayre:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

Please express our sincere thanks to your colleagues for their participation and ensure them that their feedback has made a significant contribution to the future of this product.

Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: Mr. Bill Flack, MIS Manager  
Mr. David Hunt, DP Training Manager



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Ms. Virginia Pennell  
AVP, Training  
CITIBANK  
399 Park Avenue  
New York, NY 10043

Dear Ms. Pennell:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

Please express our sincere thanks to your colleagues for their participation and ensure that their feedback has made a significant contribution to the future of this product.

Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: Mr. Victor Zurlo, AVP, Data Processing



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Mr. John J. O'Connor  
Educational Administrator  
Data Processing Division  
Blue Cross/Blue Shield  
of Greater New York  
622 Third Avenue  
New York, NY 10017

Dear Mr. O'Connor:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

Please express our sincere thanks to your colleagues for their participation and ensure them that their feedback has made a significant contribution to the future of this product.

Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: Ms. Geri Riegger, AVP Data Processing





# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Mr. Robert Shaw  
Training Director  
American Telephone and Telegraph  
Data Systems Education Center  
140 Centennial Avenue  
Piscataway, NJ 08854

Dear Mr. Shaw:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

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Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: Mr. Jerry Puterbaugh



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

November 7, 1983

Mr. Joseph McNally  
Data Administration  
Blue Cross/Blue Shield  
of Greater Philadelphia  
1333 Chestnut Street  
Philadelphia, PA 19107

Dear Mr. McNally:

Interactive Training Systems joins INPUT in thanking you and your colleagues for participating in the interactive video research session we recently held at your company. INPUT has reported the recommendations to ITS who is now in the process of reviewing these enhancements. When your recommendations have been considered the result will be a product that will more closely meet your training needs.

Please express our sincere thanks to your colleagues for their participation and ensure them that their feedback has made a significant contribution to the future of this product.

Sincerely,



Richard L. Peterson, Ph.D.  
Senior Consultant

RLP/lcg

cc: Mr. Glen Breen, Senior Director



## Findings - general

- In house courseware dev. is expensive & time consuming
- End user training sometimes not the responsibility of dp training

### • Anthony JIAS

CAS 3000 for H-P 3000 from Educational Comp Sys, Cincinnati

CAS DEC address in VAX

Phoenix (EASE Address Sys) - Gail Sys. Columbus <sup>Prescriptive Phenomix DS</sup>

End-user needs: dp concepts, quick starts, refreshers, aids, help in overcoming diggs in advanced use, explanation of assumptions behind models

For end user - let student decide what he wants/needs.

for students of curricula, let instructor (and success) decide

knowing how to perform a skill. Not just knowing what it is

CAS - less important for end user

Student vs end user: choice - end user gets told student content  
testy - " " " wants none

Simulation vs role

admin: sensitive areas such as <sup>access to comp db</sup>

Generic vs Custom: depends on parochial interests & uniqueness

Index of materials for specific comments

Prob & boxes, in depth vs a few skills for immediate problem

There is competition in end user training

Prescriptive vs Authoring System

Use of "hidden tests"

Consistency vs fit with ~~test~~ individual needs

3000 info center now. 12,000 to 12/84

4 byes agent user: exec & senior manager - video - concept

end user manager

- concept + how to

end user prog

system user

video part for concept

Options: Turn off (select)

Modis, via authentication

Levity: equivocation, deconstruction, ascription, ad. context

Size, age, stability, was not a big issue

Interaction provides system

Interactive Training  
Demonstration/Interview Protocol  
October 3, 1983

TDP

Doug King ITS

Joe McNally - Data Administration / de facto DP Training

I. Introductions (INPUT)

A. Opening Remarks

Cheryl Thomas - Corp. Training Admin.

Jim O'Connell - DBA / Training

1. Welcome/Thank you

Howard Rudisell - Dir., Apple Programming

2. Purpose

- Demonstrate interactive training product.
- Solicit reactions vis-a-vis your company needs.

3. Background

- Technological advances brought the need for training.
  - Stand-up trainers were a good first solution.
  - But as the number of students increased and the issues became more complex, trainers couldn't tailor courses to the local needs and couldn't give students the individual attention needed to comprehend material.
  - Each solution only addressed part of the problem.
    - CBT (IIS or Phoenix) provided some tailoring and management of student training but didn't allow the necessary video component.
    - Video-based training offered the necessary "live" instruction but sacrificed control.
  - Best solution is combination of video and computer. Students actively participate and control their learning.

4. Client and INPUT

a. Client background.

- Custom Training.
- Development of training system product.
- Interest in assessing opportunities in dp training.

b. INPUT's role.

- Objective, independent analysis.
- Procedure: show product, get your evaluation, report results, make recommendations.

Glen Brown, Dir, Systems





5. Ground Rules

a. INPUT

1. Information is confidential.
2. Individual respondents anonymous.

b. Respondents

1. Objective analysis.
2. Careful analysis of issues.

B. Respondent Identification

1. Name.
2. Title. *See p1*
3. Responsibilities.
4. Involvement in training decisions.
5. Size of dp training; budget; number of students; percent of IS budget?

II. DEMONSTRATION

A. Introduction

1. Hardware

- a. Personal computer.
- b. Color monitor.
- c. Videocassette or videodisc player.
- d. Controller - interface between computer and video source.
- e. Special software.

2. Spectrum of capabilities

- a. UNIX.
- b. Flight simulation.
- c. Look at capability and content.

3. Procedure

- a. View demonstration, asking questions about the product.
- b. After demo will discuss the potential of this type of product to meet your training needs.



B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

III. Interview

A. General Reactions

1. What is your overall impression of the product?

excellent

"

- a. How much of the necessary interactivity does it provide?
- b. How much of the necessary control does it provide management and student?
- \* c. How tailorable does the system seem to be?
- excellent d. How "engaging" <sup>active</sup> does it appear?

2. Does this approach represent a "quantum leap" in training technology?

- a. Why or why not?
- b. What is needed to make it more of a leap?

- B. What advantages (and then disadvantages) do you see in comparing this approach to:

1. Live instruction. (~~don't~~)

- a. with in-house instructors? } don't use much
- b. with outside instructors? }
- c. Outside courses/seminars? (about \$20k/yr)

See att. A/B & B

2. Video training? (most of current training)

3. Other CBT using terminals tied to a mainframe?

- C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)? ok
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?

See att D.1, otherwise  
Control is a  
"superfeature"

\* Could have some problems if not tailored to installation standards in technical area.

(not a "fatal" defect)

ITS needed for customizing



D. What other concerns do you have of the product?

1. Management system? *see att. on Scoring*
2. Cost/benefit data? *} NO problem - Intuitive acceptance*
3. Proof of effectiveness? *}*
4. Size of library? *Need SDP, 5 end user courses - should cover most of spectrum*
5. Others?

E. How would you use this system?

1. Addition to current training or replacement? *both*
2. What types of training would you use this with? *Could be used for all*
  - a. Basic conceptual?
  - b. Procedural?
  - c. Highly complex?

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? *for end users*
2. User training, including PC literacy? *V. imp to their future direction*
3. Programming? *yes, but less so*
4. Logical database design? *probably yes*
5. Systems analysis and design? *yes*
6. Project management? *yes*
7. Others? *CICS*

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for
  - a. Live (\$40 is a good average for fully burdened)
  - b. Video (\$5)
2. Given these figures, what would you expect to pay per hour of instruction?
3. What would you be willing to pay?
4. If video modules average \$60/module month, how much would you be willing to spend on this product? *Spend \$40/module mo - would spend 2x on UNIX, 4x on simulator-type. "3x not unreasonable"*
5. How much do you spend on 1 course?
  - a. Number of modules in course (M).
  - b. Number of days in course (D).
  - c. Number of classes per year (Y).

*but want to reduce overall costs*

*would want purchase accruals (602)*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
6. Budget.
- a. What is your IS budget? *80 system professionals - 2-3% of time in training (est)*
- b. What is the dp training budget?
1. How much is for live?
  2. How much is for video?
  3. How much is for other?
- c. How much of this would you be willing to spend on this product?
1. What % would come from live?
  2. What % would come from video?

#### IV. Conclusions

##### A. Futures

1. Disc vs. tape: At what disc price could you justify a new investment in disc?
2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?  
One station? *probably*  
Learning Center with \_\_\_\_\_ stations.  
Local network.  
Distributed network with mainframe interface. *} little interest*
  3. Other training uses.

##### B. May I answer any questions for you?

1. When will the courseware be available? (List)
2. How much will it cost?
3. What courses will be available? (List and then research)
4. How does it differ from brand X?
5. Why is it so expensive?
6. What evidence is there that it's more effective?
7. What other training areas will be covered? When?
8. What is the identify of the vendor?
  - a. Name?
  - b. Background?

##### C. Thank You!





## A/B Reaction

- Unsure whether would be ok to skip ahead; might be too slow for some users
- A little uncomfortable w/ system mechanics
- Technical staff will "love" (don't show to them first - will ~~be~~ want one)
- Psych value ~~to~~ to company of buying "today's tools" (may help hold staff)
- Good for end user training
- Control by student is a "super" feature
- "very inventive"
- Are video game tones appropriate for a serious learning tool?
- S-3 demo: "fantastic" "incredible"
- "Much longer session possible" on IVT than on CBT
- IVT combination "will overcome" prior problems (video, live, CBT)
  - Now students "will have power over the medium"
-



B. IVT vs ~~live~~ live

IVT + : onw interface

- available when needed

- more engaging
- more interactive

- better at determining knowledge

IVT - : less geared to individual precise needs

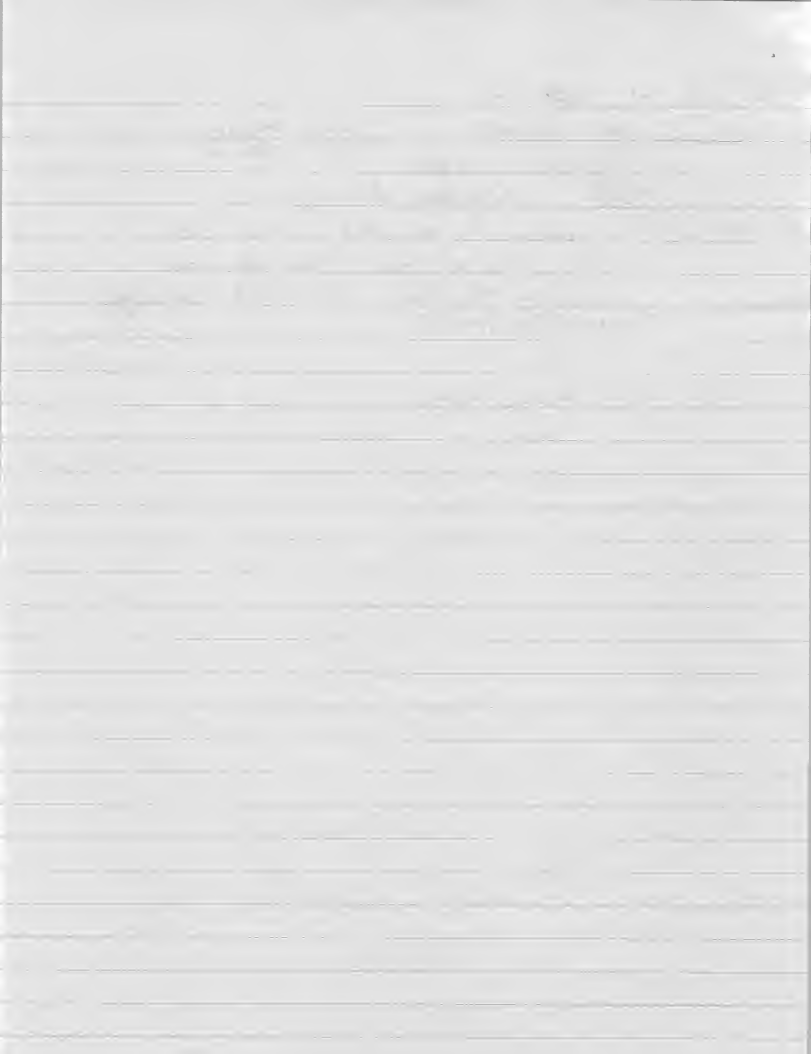
(although later discussion showed the was

more of a theoretical than actual advantage)

- Dry + tech (but not S-J)

+ video

Better than CBT in every respect

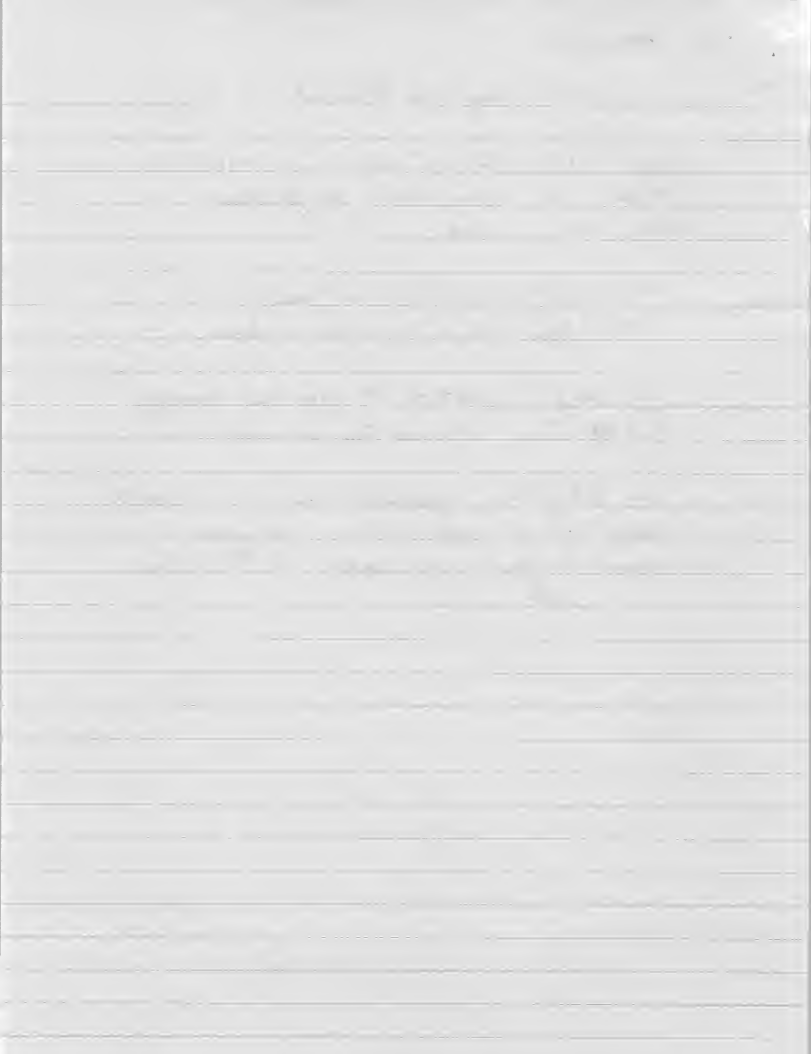


## Main Concern: Scoring

D1 Considerable concern~~ing~~ was expressed over scoring

General feeling that it was ok for trainees to be tested, but scoring would ~~be~~ produce too much "fear" in users

- Professionals, esp sr profs, don't want to have others know where they make mistakes
- They do usually want to test their own mastery, but want them to be under their own control
- The testing/scoring approach, where it is under the control of an administrator or mgr goes against the goal system concept that the student is in control



Somewhat of a blair even though egup was given

↳ 2 yrs ago

[ CBT  
Video  
Audio con  
prog instr ]

spat 1 yr +

Exec mgt natural down  
enhanced 2 months

+

+

perceived wanted CBT <sup>mainframe</sup>  
too expensive to use computer

didn't "want to get too attached"

→ Genl course ←

- no idea on total  
-

95% live

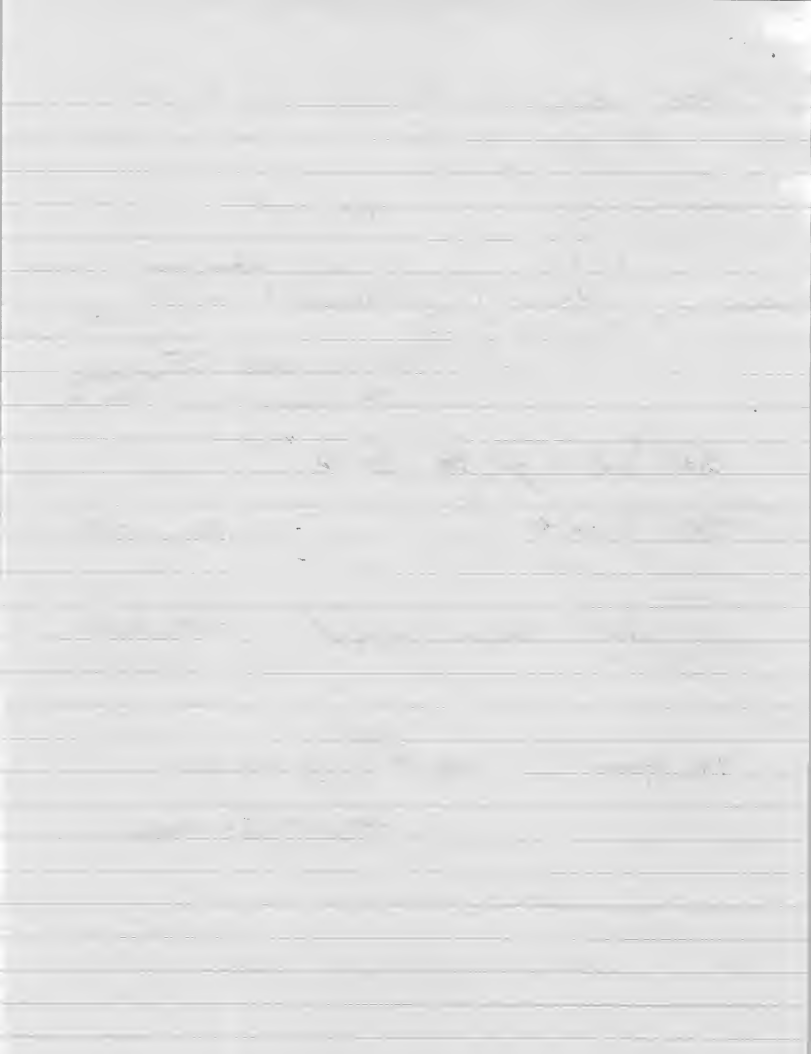
replace / supplement

{ - eff leader  
- interviewing skills

\* "Very impressed"

(need)  
req → shorter modules

break into  $\frac{1}{2}$  hr modules





## Phone conversation with Corp Training Coordinator (10/12)

- "Very impressed" but didn't want to get too attached to it" since top mgmt had discouraged a mainframe-based CBT last yr on grounds of tying up computer resources
- Would need general management courses to turn them on (eg, effective leadership, interviewing skills)
- Saw it as possible that IVT could replace/supplement a significant portion of live training ("but "would have to see it work")
- Thought modules were too long, believed that 1 hr average would be better

1. The first part of the paper is devoted to a discussion of the

main results of the paper, which are summarized in the following

theorems. The first theorem is a generalization of the

second theorem of the paper, which is a generalization of the

third theorem of the paper, which is a generalization of the

fourth theorem of the paper, which is a generalization of the

fifth theorem of the paper, which is a generalization of the

sixth theorem of the paper, which is a generalization of the

seventh theorem of the paper, which is a generalization of the

eighth theorem of the paper, which is a generalization of the

ninth theorem of the paper, which is a generalization of the

tenth theorem of the paper, which is a generalization of the

eleventh theorem of the paper, which is a generalization of the

M-21

## B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

## III. Interview

### A. General Reactions

1. What is your overall impression of the product?
  - a. How much of the necessary interactivity does it provide?
  - b. How much of the necessary control does it provide management and student?
  - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
  - d. How "engaging" does it appear?
2. Does this approach represent a "quantum leap" in training technology?
  - a. Why or why not?
  - b. What is needed to make it more of a leap?

### B. What advantages (and then disadvantages) do you see in comparing this approach to:

*less individual + interactive with others*

1. Live instruction.
  - a. with in-house instructors?
  - b. with outside instructors?
  - c. Outside courses/seminars?

*Better than video*

2. Video training?
3. Other CBT using terminals tied to a mainframe?

### C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)?
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?

*Need to customize*



D. What other concerns do you have of the product?

- What other things would it take to*
1. Management system?
  2. Cost/benefit data?
  3. Proof of effectiveness?
  4. Size of library? *Yes*
  5. Others? *server?*

E. How would you use this system?

1. Addition to current training or replacement?

*Support for/in  
use with students who have  
some skill*

2. What types of training would you use this with?

- a. Basic conceptual? *Students*
- b. Procedural? *Operator, languages*
- c. Highly complex? *logical db design*

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? - *literacy*
2. User training, including PC literacy?
3. Programming? *structured programming*
4. Logical database design? *data analysis, structured design - logical db*
5. Systems analysis and design?

*Common networks*

6. Project management? *- Not good for load-bearing type courses*
7. Others? - *operator training*

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for

- a. Live (\$40 is a good average for fully burdened) *includes, student salary, materials, etc.*
- b. Video (\$5)

2. Given these figures, what would you expect to pay per hour of instruction? *Include hardware*

3. What would you be willing to pay?

4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x 2x, etc.*

5. How much do you spend on 1 course?

- a. Number of modules in course (M). *Live video \$700/do, 1 for live*
- b. Number of days in course (D).
- c. Number of classes per year (Y).

*2x video  
(depends on  
action)*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
6. Budget.
- What is your IS budget?
  - What is the dp training budget?
    - How much is for live?
    - How much is for video?
    - How much is for other?
  - How much of this would you be willing to spend on this product?
    - What % would come from live?
    - What % would come from video?

#### IV. Conclusions

##### A. Futures

- Disc vs. tape: At what disc price could you justify a new investment in disc?
  - Local vs. distributed. *would use with mainframe*
    - What would be your likely installation now? In three years?  
One station?  
Learning Center with \_\_\_\_\_ stations.  
Local network.  
Distributed network with mainframe interface.
  - Other training uses.
- B. May I answer any questions for you?
- When will the courseware be available? (List)
  - How much will it cost?
  - What courses will be available? (List and then research)
  - How does it differ from brand X?
  - Why is it so expensive?
  - What evidence is there that it's more effective?
  - What other training areas will be covered? When?
  - ~~What is the identify of the vendor?~~
    - ~~Name?~~
    - ~~Background?~~

C. Thank You!





## B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

## III. Interview

## A. General Reactions

1. What is your overall impression of the product?

- "Very flexible"*  
*Highly interactive*  
*Teaching media*  
*with great potential*  
*Too many choices*
- a. How much of the necessary interactivity does it provide?
  - b. How much of the necessary control does it provide management and student?
  - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
  - d. How "engaging" does it appear?

2. Does this approach represent a "quantum leap" in training technology?

- a. Why or why not?
- b. What is needed to make it more of a leap?

- B. What advantages (and then disadvantages) do you see in comparing this approach to:

- "Videos don't take vacation"*  
*+ engage in control dialogue*
1. Live instruction.
    - a. with in-house instructors?
    - b. with outside instructors?
    - c. Outside courses/seminars?
  2. Video training?

3. Other CBT using terminals tied to a mainframe?

- C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)?
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?

*Dis: live is current,*  
*Might be intimidating for some*  
*Should ITS force a curriculum*  
*Do as Unix, need video*  
*Audio is nice, but*  
*Is video necessary?*  
*Needs a good introduction to student*

*would want to make*  
*control to reflect*  
*state of the art*



D. What other concerns do you have of the product?

1. Management system?
2. Cost/benefit data?
3. Proof of effectiveness?
4. Size of library?
5. Others?

Must have a good package  
Security is not a problem  
Must have updates  
Index of terms, commands for quick  
reference training

E. How would you use this system?

1. Addition to current training or replacement?
2. What types of training would you use this with?
  - a. Basic conceptual? *Fundamentals*
  - b. Procedural? *Operator, languages*
  - c. Highly complex? *logical db design*

Good video center tool  
(stand alone, not training)  
Subjects where there are  
few students at a time

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses?
2. User training, including PC literacy?
3. Programming?
4. Logical database design?
5. Systems analysis and design?
6. Project management?
7. Others?

Unix is not good because AIST an  
1 version ahead of commercial  
Computer Operator  
Installation + operation of MVS/VS  
Capacity Planning  
Good for stable courses  
" " introductory courses  
Comp. Lit

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for-

- a. Live (\$40 is a good average for fully burdened) *instructor, student salary, materials, etc.*
- b. Video (\$5)

2. Given these figures, what would you expect to pay per hour of instruction? *Include hardware*

3. What would you be willing to pay?

4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x 2x, etc.*

5. How much do you spend on 1 course?

*Live Video*

- a. Number of modules in course (M).
- b. Number of days in course (D).
- c. Number of classes per year (Y).

*If Live = 100  
this is 70-80*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc? ~~would be X 7 disks~~
- 2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?
    - One station?
    - Learning Center with \_\_\_\_\_ stations.
    - Local network.
    - Distributed network with mainframe interface.
- 3. Other training uses.

##### B. May I answer any questions for you?

- 1. When will the courseware be available? (List)
- 2. How much will it cost?
- 3. What courses will be available? (List and then research)
- 4. How does it differ from brand X?
- 5. Why is it so expensive?
- 6. What evidence is there that it's more effective?
- 7. What other training areas will be covered? When?
- 8. ~~What is the identify of the vendor?~~

a. ~~Name?~~

b. ~~Background?~~

##### C. Thank You!



## B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

## III. Interview

## A. General Reactions

- Good system but doesn't fit needs*  
*About the same as video*  
*Might be better for some things, such as simulations*  
*"better"*
1. What is your overall impression of the product?
    - a. How much of the necessary interactivity does it provide?
    - b. How much of the necessary control does it provide management and student?
    - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
    - d. How "engaging" does it appear?
  2. Does this approach represent a "quantum leap" in training technology?
    - a. Why or why not?
    - b. What is needed to make it more of a leap?
- B. What advantages (and then disadvantages) do you see in comparing this approach to:
- Dis.*  
*Too complicated*  
*"Elaborate"*  
*Too many student options, too flexible*  
*Manager will have more control*  
*"at least comparable"*
1. Live instruction.
    - a. with in-house instructors?
    - b. with outside instructors?
    - c. Outside courses/seminars?
  2. Video training?
  3. Other CBT using terminals tied to a mainframe?
- C. What changes in this training technology would you require; if any, before you purchased it?
1. Level of interactivity (Specify)?
  2. Level of control (management and student) (Specify)?
  3. Level of tailorability (Specify)?
- Man. minor redesign issues*  
*Must be able to modify course*
- Adv.*  
*Authoring capabilities - Must be able to use with other vendors*  
*Good for ad hoc requests*  
*Good for sparse attendance*  
*Don't need presentation disk like Edutronics*  
*Reports must be easy to get*  
*Easy to register students*  
*Not a curriculum need, but short segments*  
*Interactivity must be useful, realistic*





D. What other concerns do you have of the product?

1. Management system?

2. Cost/benefit data?

3. Proof of effectiveness?

4. Size of library?

5. Others?

E. How would you use this system?

1. Addition to current training or replacement?

2. What types of training would you use this with?

a. Basic conceptual? *End user*

b. Procedural? *Operator, languages*

c. Highly complex? *1-gcl db design*

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? *Yes*

2. User training, including PC literacy?

3. Programming?

4. Logical database design?

5. Systems analysis and design?

6. Project management?

7. Others? *Operator training - don't need video here.*

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for

a. Live (\$40 is a good average for fully burdened)

b. Video (\$5)

2. Given these figures, what would you expect to pay per hour of instruction? *Include hardware*

3. What would you be willing to pay?

4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x 2x, etc.*

5. How much do you spend on 1 course?

a. Number of modules in course (M).

b. Number of days in course (D).

c. Number of classes per year (Y).

*Service (backing copies) must be available*  
*n*

*anything*  
*Questionable that it would replace n*  
*Want to train end users groups*  
*to be authors*

*needs*  
*Integral in Xenix because of multi-user*  
*End-user*  
*Coax (entry + adv.)*  
*Input skills*  
*SQL*  
*Budget Estimation*  
*MVSXA*  
*CMS*  
*Good for WP*

*instructor, student salary*  
*materials, etc.*

*Live Video*

*Need license for multisites*

*Must show it -*  
*can train more*  
*people than live*

*Regrader +*  
*Follow-up to*  
*live*

*Would pay*  
*passive + \$10*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc?
- 2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?  
One station?  
Learning Center with \_\_\_\_\_ stations.  
Local network. *Yes on CICS 350 System.*  
Distributed network with mainframe interface.
- 3. Other training uses.

##### B. May I answer any questions for you?

- 1. When will the courseware be available? (List)
- 2. How much will it cost?
- 3. What courses will be available? (List and then research)
- 4. How does it differ from brand X?
- 5. Why is it so expensive?
- 6. What evidence is there that it's more effective?
- 7. What other training areas will be covered? When?
- 8. ~~What is the identify of the vendor?~~

~~a. Name?~~

~~b. Background?~~

##### C. Thank You!

100

B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

III. Interview

A. General Reactions

1. What is your overall impression of the product?
    - a. How much of the necessary interactivity does it provide? *Good*
    - b. How much of the necessary control does it provide management and student?
    - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
    - d. How "engaging" does it appear?
  2. Does this approach represent a "quantum leap" in training technology?
    - a. Why or why not?
    - b. What is needed to make it more of a leap?
- B. What advantages (and then disadvantages) do you see in comparing this approach to:

1. Live instruction.
  - a. with in-house instructors?
  - b. with outside instructors?
  - c. Outside courses/seminars?
2. Video training?
3. Other CBT using terminals tied to a mainframe?

C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)?
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?

*Rep. they to make it less complicated  
More help in getting started*

*Intend to not be appropriate*

*Intimidating  
Live is best*

*Must be able to use  
without help*



D. What other concerns do you have of the product?

- what other thing would it take for*
1. Management system?
  2. Cost/benefit data?
  3. Proof of effectiveness?
  4. Size of library?
  5. Others?

*Mal provide suggest, training  
unbundle*

E. How would you use this system?

1. Addition to current training or replacement?
2. What types of training would you use this with?
  - a. Basic conceptual? *Students*
  - b. Procedural? *Operator, language*
  - c. Highly complex? *logical db design*

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? *End user*
2. User training, including PC literacy?
3. Programming?
4. Logical database design?
5. Systems analysis and design?
6. Project management?
7. Others?

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for

*\$1500 unit  
this guy*

- a. Live (\$40 is a good average for fully burdened) *includes, student salary material, etc.*

- b. Video (\$5)

2. Given these figures, what would you expect to pay per hour of instruction? *Include hardware*

3. What would you be willing to pay?

4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x 2x, etc.*

5. How much do you spend on 1 course? *Live video*

- a. Number of modules in course (M).

- b. Number of days in course (D).

- c. Number of classes per year (Y).

*Reht eqing - give credit on loan*

*Currently guys \$75/mo. would go 2-2.5 times*





- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc?
- 2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?
    - One station?
    - Learning Center with \_\_\_\_\_ stations.
    - Local network.
    - Distributed network with mainframe interface.
- 3. Other training uses.
- B. May I answer any questions for you?
  - 1. When will the courseware be available? (List)
  - 2. How much will it cost?
  - 3. What courses will be available? (List and then research)
  - 4. How does it differ from brand X?
  - 5. Why is it so expensive?
  - 6. What evidence is there that it's more effective?
  - 7. What other training areas will be covered? When?
  - 8. ~~What is the identify of the vendor?~~
    - a. ~~Name?~~
    - b. ~~Background?~~

C. Thank You!



B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

III. Interview

A. General Reactions

1. What is your overall impression of the product?
  - a. How much of the necessary interactivity does it provide?
  - b. How much of the necessary control does it provide management and student?
  - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
  - d. How "engaging" does it appear?
2. Does this approach represent a "quantum leap" in training technology?
  - a. Why or why not?
  - b. What is needed to make it more of a leap?

B. What advantages (and then disadvantages) do you see in comparing this approach to:

1. Live instruction.
  - a. With in-house instructors?
  - b. with outside instructors?
2. Video training?
3. Other CBT using terminals tied to a mainframe?

C. What changes in this training technology would you require; if any, before you purchased it?

1. Level of interactivity (Specify)?
2. Level of control (management and student) (Specify)?
3. Level of tailorability (Specify)?

Sim a good  
part of it that  
very exciting  
interactivity

Use of error as  
a feedback

Must have  
ability to  
compare

Must have data requirements



D. What other concerns do you have of the product?

- What other thing would it take to*
1. Management system?
  2. Cost/benefit data? *Prior unburdened*
  3. Proof of effectiveness?
  4. Size of library?
  5. Others?

E. How would you use this system?

1. Addition to current training or replacement? *Use as backup to subject*
2. What types of training would you use this with?
  - a. Basic conceptual? *Students*
  - b. Procedural? *Operator, languages*
  - c. Highly complex? *logical db design*

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? *Good for tool + method.*
2. User training, including PC literacy? *Teller, train*
3. Programming? *Final module*
4. Logical database design? *BA*
5. Systems analysis and design? *Must*
6. Project management?
7. Others?

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for?
  - a. Live (\$40 is a good average for fully burdened) *instructor, student salary materials, etc.*
  - b. Video (\$5)
2. Given these figures, what would you expect to pay per hour of instruction? *Include hardware*
3. What would you be willing to pay?
4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x 2x, etc.*
5. How much do you spend on 1 course? *Live video*
  - a. Number of modules in course (M).
  - b. Number of days in course (D).
  - c. Number of classes per year (Y).

*16k/course!*

*Pay as much as live*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc?
- 2. Local vs. distributed.
  - a. What would be your likely installation now? In three years?
    - One station?
    - Learning Center with \_\_\_\_\_ stations.
    - Local network.
    - Distributed network with mainframe interface.
- 3. Other training uses.

##### B. May I answer any questions for you?

- 1. When will the courseware be available? (List)
- 2. How much will it cost?
- 3. What courses will be available? (List and then research)
- 4. How does it differ from brand X?
- 5. Why is it so expensive?
- 6. What evidence is there that it's more effective?
- 7. What other training areas will be covered? When?
- 8. ~~What is the identify of the vendor?~~

~~a. Name?~~

~~b. Background?~~

##### C. Thank You!

11/1



## B. Demonstration

1. Introduce first segment.
  - a. Content.
  - b. Special features.
2. Introduce second segment.
  - a. Content.
  - b. Special features.

## III. Interview

### A. General Reactions

1. What is your overall impression of the product?
  - a. How much of the necessary interactivity does it provide?
  - b. How much of the necessary control does it provide management and student?
  - c. How tailorable <sup>to individual needs</sup> does the system seem to be?
  - d. How "engaging" does it appear?
2. Does this approach represent a "quantum leap" in training technology?
  - a. Why or why not?
  - b. What is needed to make it more of a leap?
- B. What advantages (and then disadvantages) do you see in comparing this approach to:

1. Live instruction.
  - a. with in-house instructors?
  - b. with outside instructors?
  - c. Outside courses/seminars?
2. Video training?
3. Other CBT using terminals tied to a mainframe?

- C. What changes in this training technology would you require; if any, before you purchased it?
  1. Level of interactivity (Specify)?
  2. Level of control (management and student) (Specify)?
  3. Level of tailorability (Specify)?

*must have keyboard instruction in intro  
must be able to modify, to update*

*Liked highlighting  
& music  
Next best thing to  
live instruction  
one of the most  
attractive  
"other video seems  
far and away  
the best"*

*Live better give  
"other things"*



D. What other concerns do you have of the product?

1. Management system?
2. Cost/benefit data?
3. Proof of effectiveness?
4. Size of library?
5. Others?

E. How would you use this system?

1. Addition to current training or replacement? *For ~~use~~ with some skill*
2. What types of training would you use this with? *Good for "algorithmic" courses*
  - a. Basic conceptual? *Students*
  - b. Procedural? *Operator, language*
  - c. Highly complex? *logical db design*

F. In which course areas would this system provide the maximum benefit?

1. Introductory courses? *Gen Comp lit*
2. User training, including PC literacy? *C programming might be difficult to do because of complexity & variety of answers*
3. Programming? *Coding not ~~generally~~ <sup>language oriented</sup>* *Cob, Mpg, Alg, Comp Sci, Webcam*
4. Logical database design? *MS, IS*
5. Systems analysis and design? *Basic intro, operation*
6. Project management?
7. Others?

G. Cost is sometimes a difficult item to compare. I would like to have you think about this in 2 ways: cost/hour of instruction and percent of budget on each mode.

1. What costs/student hour do you have for

- a. Live (\$40 is a good average for fully burdened) *includes, student salary*
- b. Video (\$5)

2. Given these figures, what would you expect to pay per hour of instruction? *include hardware*

3. What would you be willing to pay?

4. If video modules average \$60/module month, how much would you be willing to spend on this product? *1x, 2x, etc.*

5. How much do you spend on 1 course?

- a. Number of modules in course (M).
- b. Number of days in course (D).
- c. Number of classes per year (Y).

*Because of tech, people expect it to be less*

Scoring  
• Can't learn integrity of score to manager  
• Might need a module on legal issues  
• Grade only when system detects  
• Feedback is important  
• Give input less single-master x?  
• Student must know scoring criteria + be taught to avoid time

Concerns about logistics + input  
• Administrative training  
• Could librarians do it

Background, research on higher level topics

C programming might be difficult to do because of complexity & variety of answers  
Cob, Mpg, Alg, Comp Sci, Webcam  
MS, IS

Basic intro, operation

*Seems like for good course*

*Loss for WP*

*Live video*

*50-75 students per station*



- d. Total \$/years =  $M \times \text{cost/module} \times D \times Y$
- f. Would you spend \$ \_\_\_\_\_ (80% of total) for interactive video?
- 6. Budget.
  - a. What is your IS budget?
  - b. What is the dp training budget?
    - 1. How much is for live?
    - 2. How much is for video?
    - 3. How much is for other?
  - c. How much of this would you be willing to spend on this product?
    - 1. What % would come from live?
    - 2. What % would come from video?

#### IV. Conclusions

##### A. Futures

- 1. Disc vs. tape: At what disc price could you justify a new investment in disc? *Solid state disk*
- 2. Local vs. distributed. *video-tex*
  - a. What would be your likely installation now? In three years?
    - One station?
    - Learning Center with \_\_\_\_\_ stations.
    - Local network.
    - Distributed network with mainframe interface.
- 3. Other training uses.

##### B. May I answer any questions for you?

- 1. When will the courseware be available? (List)
- 2. How much will it cost?
- 3. What courses will be available? (List and then research)
- 4. How does it differ from brand X?
- 5. Why is it so expensive?
- 6. What evidence is there that it's more effective?
- 7. What other training areas will be covered? When?
- 8. ~~What is the identity of the vendor?~~

a. ~~Name?~~

b. ~~Background?~~

##### C. Thank You!



John Gardner  
Mary -

Developing a system of interactive video disk <sup>AT&T</sup>  
No need for a "black box" to interconnect different disks  
Light pens are not desirable.  
Training on Acet sys., etc.

Kern Lewis - UNIX instructor

Is it generic or a specific version -

Product:

Need Keyboard instruction

Check ~~data~~ <sup>data</sup> spreadsheet questions on list directory 15-a

Should have a relation to a manual to get Sgaminir with it  
This would cover all types of UNIX (CONIX, ZENIX, etc)

Might have manual page in student manual

Liked highlighting exercise & music

Compare to other students -

C programming - problems with complexity and variety of answers

Leaves integrity of student scores to manager

Might need a module on applications for managers

Current practice is not to grade - this may change to go for

<sup>Score</sup> Certain courses where Sgaminir is involved

Feedback is important

Manager: 90% complete, wrong

Can start course at any point

Student should know to log off to not waste time

Better day of cumulative test session

Maybe scores should be regulated in a limited way.

Maybe only mastery should be reported.

Corp center new regimens, comp sci, telecom  
management ed, issues, symposium (the mgmt)

Tech: Sgaminir

Manager

Crypt training (various etc)  
Tech Ed for mgmt (" " ")

Interactive-led, face-to-face (Tech)  
might all types, but mostly live

NR Jester, GM, Camp SB

~~Courses:~~

50-75 st. By / station : 6 partly copy of course

As on how it handles groups-

"More attractive" "Next best thing to live instruction"

Administrator Skills? - "Not much work" Could Librarian do it? Yes

Interview

Mag - Screen

"One of most attractive"  
"The video screen"

Accommodate all input modes

Standard unit structure

Gets content

"Far & away the best"

For people with some skills →

Superior to ~~screen~~ live for overview. "algorithmic course", basic important  
"Would be interested in C" SB

+ Able to type in commands

→ Good for background on higher level topics refresher

~~live~~ better for applications →

• Could use this as a "coding" course followed by a "programming" course

• Problems → Is it flexible enough to update or modify?

• White screen is tiring → Screen are too busy, particularly in scrolling  
for UNIX - reference manual

Should be structured to be cost-effective: lack of area is they  
show competence. Could use manual for remedial

General computing topics, overview of languages, non-procedural (we not into)

Not sure of best areas of use.



3 cases = 1 station

2 (WE)

- Because tech people expect \$ to be less  
50% ~~neg~~ live

- Bundle at first

20K training days at in WE

Skills Download Video Interactive Video

30% for good cases less for WP



Company: Western Electric

HQ Address 222 Broadway  
NY NY 10038

Telephone # \_\_\_\_\_

No. Div/Co's 4 major subd

No Employees 168K

Main DP CPUs \_\_\_\_\_

Corp Data Center is in South Carolina  
3033  
370/158  
AMD 470 u/8

★★ Training is Princeton, NJ

609-639-4340 Judy Gordon  
Dep. Chief  
W.E. Training Center ("Alternate  
Princeton, NJ Delivery Systems")  
Carter Road

Between  
Princeton  
&  
Hopewell

Scheduled Tues 10/11 8:30 AM

★ Training is very much internal / may be possible competitor!



Company \_\_\_\_\_

~~XXXX~~ XAIZ

page 2

1) MZS VP/Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Dir Systems Prog

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Dir Operations

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4) EDP Training Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5) Corp Training Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6) UP of Personal

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Shirley Hogue

ND TP Ex 19

W Rt 18

Rt 1 South

To Lawrenceville (Right side RT)

Red Franklin Corner

Follow to 206

N on 206

L at 3rd Light (Carton)

Look for Englewood Resid Bldg

Next build on right

Data Systems Education Center  
Jerry Peterbaugh

Bob Show

• Several UNIX courses

Mgmt

General

Video vs Live

Scoring

Cost Pricing

8 people (2 left)

Reaction to CTG? - not experts

How much should ITS force a progression

Distinguish "Command" vs "Serial" of the command

~~Graphics - are the~~

Video is it really necessary for UNIX?

~~Could~~ Could audio be improved

In lesson exercises give more than 1 example.

Ann A - B: Hard disk - need a hard disk to cut down on waiting time

Tie to reference manual

Would want to modify tech - AT&T is 1 version ahead

Very much like that

Like <sup>random</sup> a-d-a, but is video necessary

Seems like there are too many choices - Hard agreed into it

It "Videos don't take reactions"

Might have targets for light pens or put them in great colors

S3 - Superimposed text explanation on video

Use graphics over on video to reinforce learning

Felix  
Mark Rosenberg  
Mory & Ken

Agenda  
~~Series~~  
Live vs video

Video workshop + Tutor  
Highly interactive  
"very sketchy"

Concept operations  
Install & setup  
of MVS, XA  
Personnel knowledge  
Circuit planning

Live is current - very important

20-80 Live > 100  
Some conservative intro  
Literary

\* Might be too interesting for execs

Large Center-based - Stand alone, multiyr training  
Must have a good package  
Security is not a question

Less arrogant - must have updates  
Must have "state-of-the-art" UNIX course

Subjects where there are few standards at all times

"Training media with great potential"

Print index of terms, commands, etc.

At Use XTs

147 instructions \$4-5m contract incl

13 new stuff / yr <sup>cons</sup>  
Inst has 20-110 hrs in class / yr





617-497-6100  
Doug K

AT&T Training Dept.  
140 Centennial Ave  
Piscataway

6 201-699-5745

Jerry Puterbaugh

Tues 10/18  
9:30

Parkway to Rt 287 (marked 287/440)

this goes  
to the

Take 287 to Route 18

Route 18 South towards New Brunswick  
100 yards jug-handle onto Centennial Ave

Building is 3<sup>rd</sup> on right

He will be around so you can  
get there at 9 to set up

---

Bob Shaw, Training Director

slowness to institute change. Says Steven M. Bauman, a product planning manager at AT&T Information Systems: "We need to dramatically reward people who are making things happen and dramatically punish people standing in the way."

**'CONCRETE AND CLEAR.'** AT&T leaders acknowledge that they have been so wrapped up in dealing with the FCC, the Justice Dept., and Congress that they have had little time to worry about internal affairs. "So much turmoil and so much time has been spent on the disintegration of the business," declares Brown. "What needs to be done is to reestablish a mission that is as concrete and clear and as inspiring as the mission that drove the company for the first 100 years."

Now that planning for divestiture is virtually completed, Brown intends to turn his attention to internal affairs. He and his wife, for example, have started to hold a series of luncheons for middle managers across the country.

Brown, who, as AT&T's president, was the main force behind the 1978 reorganization, wants to create an environment in which a proliferation of market-driven, cost-competitive businesses can flourish. But at the same time, he is determined to preserve the commitment to service and employee loyalty that has been AT&T's strength.

Continued regulation is making those goals tough to achieve. Nowhere is this more evident than at AT&T Information Systems, which must still operate under cumbersome FCC restrictions. Unless the FCC rules otherwise, Information Systems will have to set up a separate organization on Jan. 1 to administer customer-premises equipment still under tariff. "The get-ready costs are phenomenal—in the hundreds of millions," laments Bruce G. Schwartz, vice-president for business services.

**SLUGGING IT OUT.** The FCC mandate that Information Systems operate as a "fully separated subsidiary" is also hindering AT&T from running its new "lines of business" as vertically integrated profit centers. Now, the factories that produce the unit's business communications and information equipment are under the jurisdiction of Western Electric's AT&T Consumer Products. The reason, according to Tobias, is a fear that the FCC-mandated communications barriers would affect Western's operations if the factories were transferred. Argues Information Systems' Day: "To be as totally competitive with the guys we're slugging it out with, we have to have that degree of integration."

AT&T executives also appear torn between the need to give managers more flexibility to make decisions and their reluctance to walk away from their leg-

## HOW BELL IS SHRINKING—AND MOVING—ITS 'PEOPLE ASSETS'

January, 1982 Breakup announced

January, 1984 Breakup takes effect

	Number of employees
AT&T corporate headquarters	13,302
Long Lines (interstate long distance)	42,834
AT&T International	530
Bell Labs	24,000
Western Electric	159,862
22 operating companies	798,000
<b>TOTAL</b>	<b>1,038,528</b>

Data: American Telephone & Telegraph Co., AT&T estimates

	Number of employees
AT&T corporate headquarters	2,000
AT&T Communications (interstate and some intrastate long distance)	120,000
AT&T International	900
Bell Labs	19,000
Western Electric	135,000
7 independent regional companies	580,000

### Central Services

Organization (research and systems engineering group owned by the 7 regionals)

8,800

AT&T Information Systems (unregulated subsidiary formed Jan. 1, 1983, with 28,000 people)

110,000

**TOTAL** 975,700

endary measurements and practices. "It is not very smart to give up a system that has served you so well in terms of keeping you up with your customers and which is valuable in the competitive world," says William G. Sharwell, vice-president for divestiture implementation. **'PACE OF CHANGE.'** Many middle managers obviously disagree. At seminars held by Chesapeake & Potomac Telephone Cos., participants frequently demanded: "When are we going to get rid of all these goddam measurements?" recalls Robert E. Allen, C&P's ex-chairman and currently AT&T's chief financial officer.

John M. Harris, senior vice-president at Booz, Allen & Hamilton Inc., believes "the pace of change" will prove to be a critical issue in AT&T's ultimate success or failure to reorient its culture—and its managers. Says Harris: "If you move too slowly, the current culture moves around anything new and engulfs it. If

you do it too quickly, you can get a reject."

But several observers and insiders insist that with competition intensifying, AT&T may have only five years or so to reorient its managers. "The key issue for senior management is now that they've gotten through the regulatory challenge and divestiture, can they shape and build the company internally to compete," says New York consultant David A. Nadler. "A lot of what they do in the next year to 18 months will shape the company for the decade to come."

## HOW ONE BELL BABY STRUGGLED TO ITS FEET

A NEW TEAM AT PACIFIC TELESIS UNTANGLED REGULATORY SNAFUS, SAVED THE BOTTOM LINE, AND POLISHED ITS IN

**T**here could be at least one Cinderella story in the breakup of American Telephone & Telegraph Co. Long considered the most troubled Bell operating company, Pacific Telephone & Telegraph Co. will look a lot better after divestiture than anyone could have foreseen—thanks to a new top management and friendlier regulators.

In the past six months, both Moody's Investor Service Inc. and Standard & Poor's Corp. have upgraded the ratings

of Pacific Telephone's bonds by two notches, respectively (to A+), reversing years of steady decline. And executives at Pacific Group—the new regional cor includes Pacific and Nevada to be convincing the investment community that its prospects have significantly.

Says James M. McCabe of Prudential-Bache Securities, "Pacific Telephone had the b



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# ASSOCIATED COMPANY DATA SYSTEMS TRAINING COORDINATORS

## AT&T — INFORMATION SYSTEMS

Randy Marshall  
Room 50-52A286  
P.O. Box 3509  
New Brunswick, New Jersey 08903  
201-457-2646

## AT&T INTERNATIONAL

Arlene A. Emery  
Room 54-1B52  
P.O. Box 7000  
Basking Ridge, New Jersey 07920  
201-953-7509

## AT&T LONG LINES

Virginia Nerney  
Room 318  
180 Centennial Avenue  
Piscataway, New Jersey 08854  
201-457-6414

## ADVANCED MOBILE PHONE SERVICE

R. J. Lawler  
Room 64-1F31  
188 Mt. Airy Road  
Basking Ridge, New Jersey 07920  
201-953-2626

## BELL LABORATORIES — BISP

E. Seager  
Room 3A-149  
6 Corporate Place  
Piscataway, New Jersey 08854  
201-981-6174

## BELL OF PENNSYLVANIA

Lawrence J. Kuhn  
16th Floor  
1818 Market Street  
Philadelphia, Pennsylvania 19103  
215-466-2294

## 195 BROADWAY CORPORATION

Bette Neese  
Room 01-1710A  
195 Broadway  
New York, New York 10007  
212-393-4546

## CHESAPEAKE & POTOMAC

Edna Wiggins  
Mail Level  
8757 Georgia Avenue  
Silver Springs, Maryland 20910  
301-565-3437

## CINCINNATI BELL

Oliver Kutzieb  
Room 660  
229 West 7th Street  
Cincinnati, Ohio 45202  
513-397-3664

## COMPTROLLERS TRAINING CENTER

Jim Zishka  
4150 E. Mexico Avenue  
Denver, Colorado 80222  
303-758-8623

## ILLINOIS BELL

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Hq. Area 6A  
225 West Randolph Street  
Chicago, Illinois 60606  
312-727-7546

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Audrey Weaver  
Room 510  
220 North Meridian  
Indianapolis, Indiana 46204  
317-265-2251

## MICHIGAN BELL

Pamela J. Pajas  
Room 500  
25900 Greenfield Road  
Oak Park, Michigan 48237  
313-968-3509

## MOUNTAIN BELL

Bruce Buntin  
Mountain Bell Training Center  
Room 221  
3898 South Teller Street  
Lakewood, Colorado 80235  
303-978-6223 or 6224

## NEW ENGLAND TELEPHONE

Patricia B. Doherty  
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225 Franklin Street  
Boston, Massachusetts 02110  
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Cedar Knolls, New Jersey 07927  
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New York, New York 10011  
212-620-6048

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100 South 19th Street  
Omaha, Nebraska 68102  
402-422-2707

## OHIO BELL

Robert Brown  
Room 306  
6889 Snowville Road  
Breaksville, Ohio 44141  
216-838-2767

## PACIFIC TELEPHONE

Bill Hicks  
Room 200  
631 Howard Street  
San Francisco, California 94105  
415-974-5355

## PACIFIC NORTHWEST BELL

Dick Okino  
Room 2307  
1600 Bell Plaza  
Seattle, Washington 98191  
206-345-2108

## SOUTH CENTRAL BELL

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Suite 204  
301 Beacon Parkway West  
Birmingham, Alabama 35209  
205-945-2065

## SOUTHERN BELL

Trudy Johnson  
Room 11S75  
675 W. Peachtree Street, N.E.  
Atlanta, Georgia 30375  
404-529-6353

## SOUTHERN NEW ENGLAND

R. Hustek  
Lower Level  
60 Temple Street  
New Haven, Connecticut 06506  
203-771-7339

## SOUTHWESTERN BELL

Roy J. Jeffers  
Room 700  
915 Olive Street  
St. Louis, Missouri 63101  
314-247-5375

## WESTERN ELECTRIC

Ed Platow  
P.O. Box 1000  
Hopewell, New Jersey 08525  
609-639-4438

## WISCONSIN TELEPHONE

Marlowe Nortrom  
Room 168  
845 North 35th Street  
Milwaukee, Wisconsin 53208  
414-678-6899



Cit & Benli

Sam G. 38110  
Victor Zurla Apt 28

- 4 train 1200 lost as 100 - then 20
- team teaching is required

Light pen?

Problems with glossy holding up  
"ed" list of chapters explain

"intest" has negative connotation

liked error examples

"M. P" - not user friendly

"Elogsub Time" - is suggesting pressure

Screen is too cluttered

intruding?

engaging?

customized?

Really liked simulation - "perfect test"

"very exciting" - "not intruding" - manages  
like this

Technical & non-technical train

"Beep" - not necessary

Liked screens in S-3

Not responsible for nardi training

Alternate  
Menu - Switch color on "Screen" govt -

Palmer Training

offic Automation Bank Inst: - Small Modeling  
must have keyboard interaction

Instructions - This could be a backup

Good to have human interface

100% live

\$16K/course

Customization very important

→ Most will want unbundled!

10 students/course

Pay as much as live

must have data preferences

Data point equiv is common

Must have a discount



Company: Citi bank

YAIZ  
page 1

HQ Address 399 Park Ave  
NY NY 10043

Telephone # \_\_\_\_\_

No. Div/Co's \_\_\_\_\_

No Employees 10K for citibank / 47K for citicorp

Main DP CPUs \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Ms. Ginny Pennell  
AUP

212-559-8269

Sch Thurs 10/6 3pm Saddle Brook



Company \_\_\_\_\_

~~YALZ~~  
YALZ

page 2

1) MZS VP/Dir

Tel #

Address

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---

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2) Dir Systems Prog

Tel #

Address

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---

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3) Dir Operations

Tel #

Address

---

---

---

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4) EDP Training Dir.

Tel #

Address

---

---

---

---

5) Corp Training Dir

Tel #

Address

---

---

---

---

6) UP of Personal

Tel #

Address

---

---

---

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## United Tech

John Bennett, Cary De + Roger, Hartford & Cambridge  
It has an "independent" group of 12 trainers who work together  
as an organization they meet regularly  
JB will recommend to them.

- Interfacing - student must be able to use without help

Rules vs Help: what to do Help + Tutor

"Quit" get you completely out of system

Change "Map" to "Quit"

Don't use green - black + white or amber or blue ink

Many DEC micros

JB liked it. Seem to like video

Good interactivity

separately

- Rent equipment - give credit on lease

- Provide trainers with support how to turn it on/off

Touch is better than light

Packaging problem to make it less complicated

Can "just say" single program

Students must be able to get started

Live instruction is best

(400)

~~Is advantage~~

40 - 5

CapEx is another budget

Pay \$75/mult. mail - will pay 2-2.5 times

Replace Vendor

Need something unique: ~~Reend users~~

Where is it significantly different that you'd pay the price?

Interactivity - must have a replacement

\$1500 five -

800 course mail = 40K/yr

\$250K - Several K will spend every year

Replac: replacement

Company: United Technologies Corp

YATZ

page 1

HQ Address Main & Pearl Streets (One Financial Plaza)  
Hartford, CT 06101

Telephone # \_\_\_\_\_

No. Div/Co's 10 major groups

No Employees 140K

Main DP CPUs \_\_\_\_\_

Dr. John Bennett  
Corp Dir, DP

203-728-7703

} 13th Floor

Scheduled

Wed 10/5

10AM

NOTE =  
Bennett has  
seen this before!





Company \_\_\_\_\_

~~XALZ~~

XALZ

page 2

1) MZS UP/Dir

Tel #

Address

2) Dir Systems Prog

Tel #

Address

3) Dir Operations

Tel #

Address

4) EDP Training Dir

Tel #

Address

5) Corp Training Dir

Tel #

Address

6) UP of Personal

Tel #

Address



Team John Jeanne's boss  
Della Gagon John? W&T Training  
Ed?

JAM

Math

John: They are very interested in alternative  
interest in graphics capability

~~Joe McLaughlin~~  
Bill Flock, M/S mgr  
David Hunt, D/Tras

Good for operator training  
~~Not to~~ Interact with programs?  
Not familiar with videodisk

Scoring  
mgmt

Interested in literary  
~~work~~ ~~IT~~ ~~technology~~

data analysis or structured design - good possibilities  
Could this be data flow? Not really  
interested in logical data base they're doing that now.  
<sup>enhanced</sup>  
need graphics -

lose relationships with other people  
\$700/day + 1¢ live

Use team training  
this suggests live  
this is better than videotape  
need to customize  
good for common subwork, expert training  
not for leadership, etc.

Good for people who have some skills  
move from light guide keyboard quickly

" 2x as good -  
depends on author

wants to be able to customize a little

Dave

Operating -  
structural

Data Analysis

More in technical area than user area

Admin Services is important

Resident Library

Company: Mobil

YAIZ

page 1

HQ Address 150 E 42nd St  
NY NY 10017

11<sup>th</sup> Floor

Pick up  
passes at  
Visitor Center

Telephone # \_\_\_\_\_

No. Div/Co's 7 major groups + # subsidiaries

No Employees 206K

Main DP CPUs 3081=1  
3033=3

Scheduled <sup>Wed</sup> 10/12 10 AM

Joannie

★ Ms. ~~Garry~~ Sayre  
DP Training Dept

DB 212-883-4903

Has made arrangements. Will  
have DP & OA training people  
there

Bill Flack, MZ Mgr (does not evaluate trans tools)

↓  
Joe McLaughlin man OA

↓  
Dave Hunt, DP Training Mgr

He is very interested esp with "authoring" problem  
Joannie Sayre works for him & is authorized to  
evaluate these tools. Very interested in CIA



Company \_\_\_\_\_

~~XXXX~~

XALZ

page 2

1) MZS UP/Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Dir Systems Prog

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Dir Operations

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4) EDP Training Dir.

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5) Corp Training Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6) UP of Personal

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





Company: BC Greater Philadelphia

HQ Address 1333 Chestnut St  
Phil PA 19102

Telephone # \_\_\_\_\_

No. Div/Co's \_\_\_\_\_

No Employees \_\_\_\_\_

Main DP CPUs \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Deck Detour*  
Joe McNally, Security Control Analyst  
12th Floor  
215 448-5128

Scheduled <sup>Friday</sup> 10/7 10AM

Ask for his extension (5128) at Rec Desk on 12th floor

He will attend  
as well as

Corp. Trainer  
Info Center Specialist  
Dir of Application Programming.



Company \_\_\_\_\_

~~XXXX~~  
XALZ  
page 2

1) MIS VP/Dir

Tel #

Address

2) Dir Systems Prog

Tel #

Address

3) Dir Operations

Tel #

Address

4) EDP Training Dir

Tel #

Address

5) Corp Training Dir

Tel #

Address

6) VP of Personal

Tel #

Address

11

Company: BC/BS NY

YAIZ

page 1

HQ Address 622 Third Ave (Between 40+41 Street)  
NY NY 10017

Telephone # \_\_\_\_\_

No. Div/Co's \_\_\_\_\_

No Employees \_\_\_\_\_

Main DP CPUs 4 = 3033  
4341

Training & Education Manager  
212-490-3208

Jack O'Connor will make all arrangements  
/ Scheduled Tues 10/4 10am

14th Floor

Thru glass doors to right to Jack's office  
leave equip by glass doors as  
conference room opposite direction  
from his office



Company \_\_\_\_\_

~~XXXX~~ XAIZ

page 2

1) MIZ UP/Dir

Tel #

Address

2) Dir System+ Prog

Tel #

Address

3) Dir Operations

Tel #

Address

4) EDP Training Dir.

Tel #

Address

Jack O'Connor

212-490-3208

5) Corp Training Dir

Tel #

Address

6) UP of Personal

Tel #

Address





# BLUE CROSS/BLUE SHIELD (Greater New York)

622 Third Avenue  
New York, NY 10017

Geri Riegger, AVP Data Processing

Contact:

~~John~~ <sup>Jack</sup> ~~Jack~~

Jack O'Connor

Educational Administrator  
Data Processing Division  
212-490-~~444~~ 3208

(Reports to MIS v.p.)

Mitchell Davick

Instructor

Data Processing Center

212-490-4161

(Reports to Educat. Admin.)

BC/BS, the largest <sup>of</sup> the quasi-independent insurance <sup>association</sup>, ~~operates~~

~~conducts~~ <sup>conducts</sup> approximately 700 <sup>of</sup> courses per year, including a growing number of end user courses. The not-for-profit status of BC/BS as well as the ~~long~~ <sup>long</sup> tenure of many of the employees creates an environment of "narrow views, ~~less~~ academic <sup>in</sup> ~~possibilities~~, and ~~more~~ political ~~involvement~~."

To cope with the situation the manager, a new hire within the last 12 months,

- keeps the Learning Center open from 10-7
- ~~uses~~ <sup>uses</sup> extensive <sup>various</sup> <sup>hire</sup> <sup>involvement</sup> "because it brings in new ideas and experience" <sup>Manager thinks this is ~~mainly~~ <sup>mainly</sup> ~~distraction~~</sup>
- makes heavy use of IIS, including the development of some <sup>of</sup> training

BC/BS is also considering alternative delivery systems <sup>Instructor would like to see more</sup>

- Growth is being considered as a vendor for end user training
- IBM/BSR <sup>although it is not agreed that eqpt. is <sup>considered</sup> ~~not~~ <sup>with</sup> ~~module~~</sup>

- Phoenix because Daltile, a BC/BS vendor is pushing it
- Edutronics has a good system

Keys to entry include:

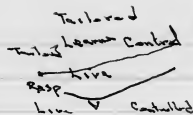
- Helping DP Training division - become "the training dept"
- Meeting needs of less talented students
- Providing an entering capability

BC/EC - 10

Heard IIS - write some training

~~Engineering~~

Deluth (I) gram CA - provides C&T for navide



NYC heavily involved with end user training

IGN- BSR - equiv. is packaged with module.

- not a good idea - better to "buy it and get it over"

Del. X pushing Phoenix

700 Skidat comes/xs - full time stuff

9 Centers x ran 10-7

Jack have 1 yr - Many employees have been here <sup>with</sup> all their time  
Their only job narrow vices, politics  
Likes live because it brings in new ideas, experiences

More disc. of end user

Guy thinks he could be the training dept

Angels to MIS v.s.



BC/BS

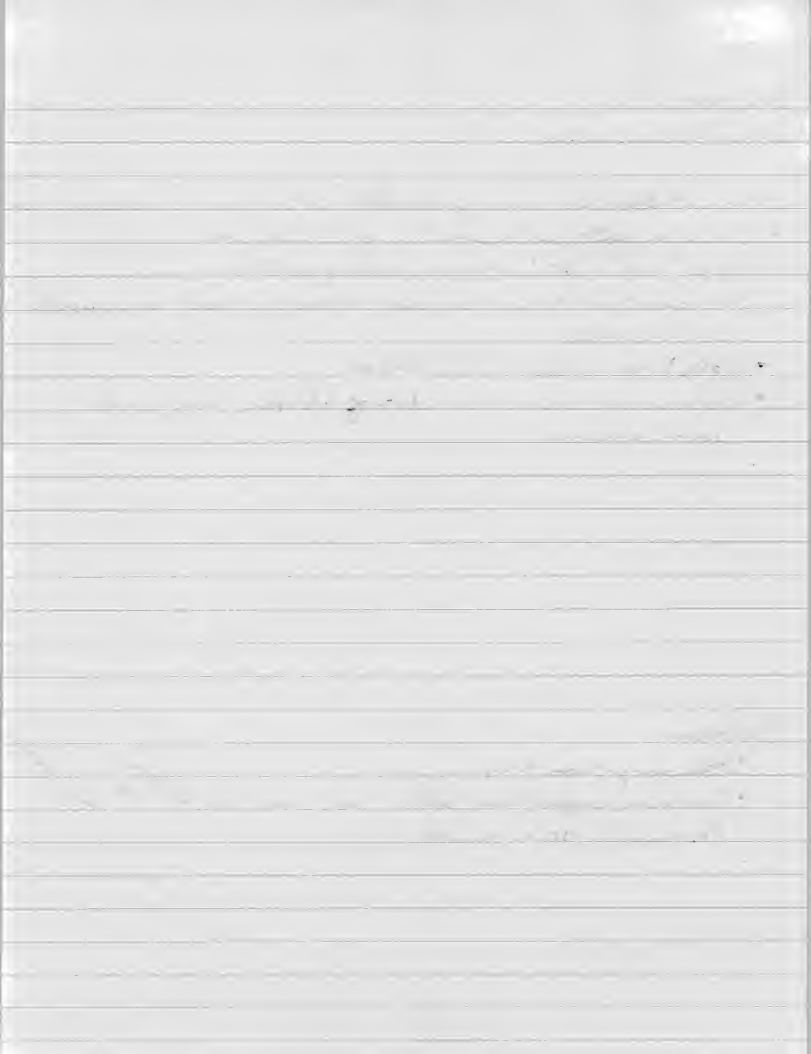
## General comments

- Did not see that it was offered better inst - About the same as video
- Could be better with something - simulation
- 1 guy - live is IT! other guy, saw possibilities
- Too complicated for audience - other guy - must be appropriate for the subject
- Both liked authoring capabilities
- Not courses here but a lot of ad hoc requests and sparse attendance -
- 

## Problems

- Stay away from authoring lang.
- Position capabilities better - not content but navigation vs
- Shorten to 40-45 minutes
- 

basic commands



CSR - System 3000

Mitch has seen Electronically-based position  
Xenix - interested in because of multi-user needs

Too complicated with options -  
Interested in authoring system (912K)

Buy Mitch really, looked for problems

Good sys but doesn't fit  
Too much flexibility - too many balls & whistles  
Managers must have control

Heck - boxes & operator - Orientation

Is it <sup>usable</sup> durable? Is authoring system useful?

sys is very flexible - too flexible

Could train end user group to be authors

Must be easy to setup screens

" " " " get mgmt report

get fast student registration

Use of other vendors to get

End user concern: How to use

Cabal: Entry table. Is understood

Mgmt skills, delegation

SQL

Buy system

Operator training:

MVSXA

CMS

★ Next start segments not acronym  
Does not have acronym need

Mgmt: must get reports quickly  
" know exactly how

Good for ~~the~~ up

Doesn't need video for console training

Audio was not good?

"Exit" hard to see

Mitch: many design issues: "Tight Too much text?"

"Press 'continue' to begin

Interactivity must be useful

==

Education doesn't use touch screen

Interactivity must be realistic - type in responses

would like to be able to modify

Need micro-manipulation - must put on CICS<sup>onto</sup> system

CICS - 1200 terminals

remote site - use pc to distribute

TS0 - 400 terminals

Need license for multiple sites

Mitch doesn't like "presentation disk idea \$100/disk

Backup ~~copy~~ copies must be available



②

Look at differences in hardware costs

to

GRA - Learn - 2nd yr is 60% of first year

Live

How flexible is it  
many varying needs

flexible availability of courses

"at least comparable"

Would it replace anything? questionable

Start Things you can't do on passive video

Passive video + 5% different

More interested in career authority

People want standing lectures

Live is best - this is reproducible, following }

Must show that you can train more people than video?

11

YAIU

Do-3 1:1  
Status Report 9/29 1:30

### Scheduled

United Technologies 10/5 10am Hartford, CT  
Western Electric 10/11 9:30 Princeton  
Citi bank 10/6 3pm Saddle Brook  
Blue Cross of Greater Phil will call back  
~~Blue Cross NYC~~ 10/4 10:00  
~~Met~~

} 3 4

### Rejects

Pennney (budget time)  
Bendix (no time)  
Hartford sho (already saw it)

} 3

### Working on (External contact/Checking status internally)

AT&T  
IBM  
Mervell Lynch  
~~BC Greater Phil~~  
GE  
DuPont  
Mobil

} 76  
Should hear from all by Friday pm

### Still to Contact

BC/NYC  
BC/Ohio  
Exxon  
Sears  
Bell Labs (may be part of AT&T)

} 5



Company: Hartford Ins  
HQ Address Hartford Plaza  
Hartford, CT 06115  
  
  
Telephone # 203-547-5000

YAIZ  
page 1

No. Div/Co's

No Employees 14K

Main DP CPUs 3081 = 4  
3033 = 4  
4341 = 4  
4331 II = 1

Down w/ to

↳ Bill Sebrell

Dr Corp Ed  
203-547-3955

because David Berg (UPDP 203-547-5470)  
was on vacation til 10/4

wed p.m?



Company \_\_\_\_\_

~~XXXX~~

XALZ

page 2

1) MIZ UP/Dir

Tel #

Address

2) Dir Systems Prog

Tel #

Address

3) Dir Operations

Tel #

Address

4) EDP Training Dir

Tel #

Address

5) Corp Training Dir

Tel #

Address

6) UP of Personal

Tel #

Address







*International Business Machines Corporation*

Office of the IBM Director  
of Commercial Relations

Armonk, N.Y. 10504

OCT 18 1983

October 14, 1983

Mr. Rich Peterson  
Senior Consultant  
INPUT  
Park 80 Plaza West-1  
Saddle Brook, NJ 07662

Dear Rich:

Thank you for your courtesies during our several telephone calls discussing Bob Berntsen's October 4 letter which proposed a demonstration and review of your client's interactive video product.

As we discussed, we do not wish to participate in the review of this product nor provide judgments regarding the approach and potential market for the product.

If your client wishes to submit his program to IBM for possible remarketing by IBM, he may contact J. M. Schoffelen, External Submissions, at the same address for guidance in initiating a submission.

Thank you for your interest in IBM and allowing us the opportunity to consider the demonstration.

Very truly yours,

W. R. Whitehurst  
Commercial Relations Representative

WRW:dh

cc: Mr. R. M. Berntsen  
Mr. E. J. Murtha



Company: Merrill Lynch & Co, Inc

page 1

HQ Address 165 Broadway  
NY NY 10080

Telephone # 212-637-7455

637-5209  
DP

Corp Aff - 1980

No. Div/Co's 15 ~~div~~ subsid

No Employees 30K

Main DP CPUs 3081; 7 = 3033; 2 = 370/168-AP  
10 = 4341; 10 = 4331

Merrill Lynch Pierre Fennel Smith = 28K

One Liberty Plaza NY NY 10080 212-637-7455

Merrill Lynch Balaban = 900

Joseph Castellano  
UP, Dir Corp Systems  
212-637-5209

↓  
Chuck DeVito  
212-807-2701

No real interest in demo  
just does not sound  
appropriate to needs



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

October 4, 1984

Mr. Emmett J. Murtha  
Manager Licensing  
IBM Corporation  
Armonk, NY 10504

400 Columbus Ave  
914-765-3573  
Uivian

10/6 staff meeting  
10  
11:15 - over phone gft

Dear Emmett:

Thank you for your time this morning, and for allowing me to briefly explain our research project on interactive video training. This letter will serve to confirm our role and nature of the project.

As a information industry research and consulting firm, we have been asked to examine the feasibility of an interactive video product based on the IBM PC. We would like to demonstrate the approach and solicit your views. INPUT is not trying to sell the potential product. We will collect the evaluation information and summarize it. Information gathered and the identity of individuals remain confidential. No information will be associated with companies we interview. We realize IBM would be unique in our interviews. Participation in no way indicates any form of endorsement of the product by IBM.

INPUT hopes to interview key decision makers regarding the applicability of this training solution to data processing needs. We have been inviting such people as MIS Director, EDP Training Director, Director of Systems and Programming, and Corporate Training Director. A group of 5 or 6 such officers and managers would provide the best overall review.

We hope to be completed with the interviews by Friday, October 14. I appreciate your offer to review what we were doing. I hope your office will be able to arrange a time for us. The demonstration and evaluation would take one and a half hours.

Sincerely,



Robert M. Berntsen  
Senior Research Analyst

RMB/lcg



Hartford Insurance Group Fire  
Company: Hartford Insurance (subof IIT) V.F.I.Z.  
page 1

HQ Address Hartford Plz  
Hartford, CT 06115  
\_\_\_\_\_  
\_\_\_\_\_

Telephone # 203-547-5000

No. Div/Co's \_\_\_\_\_

No Employees 19K

Main DP CPUs 4 = 3081; 4 = 3033; 4 = 4341; 4331-II  
AMD470 V/6-II  
\_\_\_\_\_

Pacific Insurance Co Ltd / Hartford Insurance Group (subsid Hartford Accident Indemnity)  
841 Bishop St Honolulu, HI 96807  
808-546-5700

Hartford Accident Indemnity / subsid Hartford Fire Insurance)  
Hartford Plaza Hartford CT 06115  
203-547-5000 2K  
David Berg VP D+Pr

Hartford Casualty  
Hartford Life Ins Co

David Berg, VP DP  
203-547-5470  
↓  
Bill Sebrell Director of Corp'd  
203-547-3955  
already saw a demo of it





Company: E.I. DuPont de Nemours  
 HQ Address 1007 Market Street  
Wilmington, DE 19848  
 \_\_\_\_\_  
 \_\_\_\_\_

Telephone # 302-774-1000

No. Div/Co's 14 div / 3 consolidated & affiliated Co's / 41 foreign consolidated & affiliated Co's

No Employees 177K ~~134K~~

Main DP CPUs 5= 3033; 3081; 370/158  
UNU 1100/83

9/26/11 - WATSBURY

Luft 9/26 2pm  
 Barbara

9/27 11-NA  
 9/28 9:10 → meeting 10:10:30  
 1:45

reject - no interest

Robert Luft, Gen Mgr of Systems  
 ↓  
 Roger Wilke  
 ↓  
 Fred Kirschman DP Training



Company: Blue Cross <sup>of Northeast</sup> ~~WED~~ Ohio YAIIV ~~YAI~~ ~~Z~~ page 1

HQ Address 2066 E 10th St  
Cleveland, OH 44115  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone # 216-687-7715

No. Div/Co's \_\_\_\_\_

No Employees \_\_\_\_\_

Main DP CPUs 3081  
\_\_\_\_\_  
\_\_\_\_\_

Anthony Gambatese VP, DP



Bob West Train Dir <sup>(asst)</sup> 687-7505



Gary Livingston Training Coordinator  
216-687-7722  
outside / never contacted  
reference YAIIV



Company: Bendix Corp

page 1

HQ Address Bendix Center  
Sandwichfield, m z 48037  
\_\_\_\_\_  
\_\_\_\_\_

Telephone # 313-827-5000

No. Div/Co's 52 div (348 Automotive, Industrial, Aerospace)  
368 div 28 US subsidiaries  
1 foreign division

No Employees ~~74.6K~~ 70K

Main DP CPUs \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Reject  
no time for such  
a project

Jean-Claude Vernieres  
m z 5 Dir  
313-827-5247



Company: Bell Labs Labs, Inc <sup>Telephone</sup>  
 HQ Address: Mountain Ave  
600 Murray Hill,  
Murray Hill, NJ 07974

Telephone # 201-582-3000

No. Div/Co's Where Where  
Lo Mary Wilan-Collins  
201-631-1023

No Employees

Main DP CPUs

9/30 declined

Bell Tel Labs  
 6200 E Broad St

Columbus, OH 43213  
 614-860-3300

L O Eagle Supervisor, Computer Systems Group  
 3033; 4341; 3-DEC PDP11/70; VAX-11/780

Wilan-Collins  
 sells

Done a lot w  
 CAI

9/27/030  
 X6400 - Com Center  
 Jack Gibbons  
 X2400

One Div has  
 Trans Center  
 C.F. Simone  
 Piscataway

981-6984  
 9/30/75  
 not

Dir. level

Don Claghon 981-6430  
 Bob MacIntyre





# YAIV

## Demonstrations

done

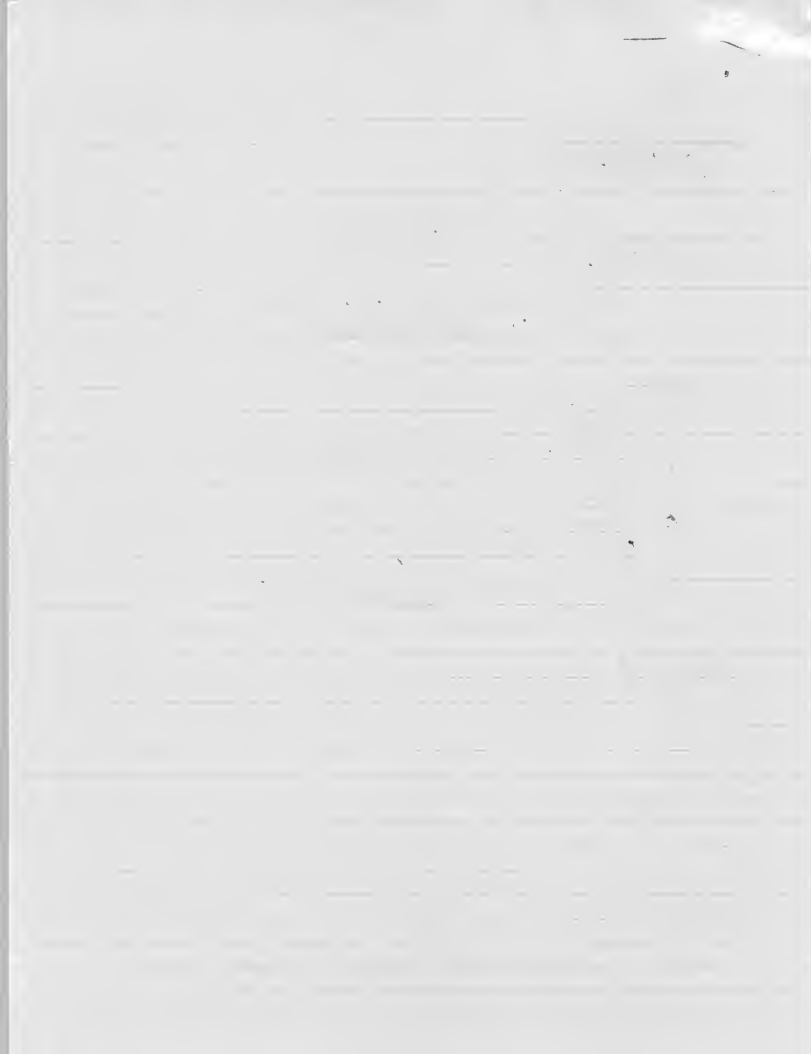
1. United Technologies
2. Western Electric
3. Citibank
4. Blue Cross of Greater Philadelphia
5. BC/BS NYC city
6. Mobil
7. AT&T - scheduled 10/18 9:30 AM
- (?) 8. IBM (?) still in the works?

## Rejects

1. Penny - budget time
2. Hartford Ins - already saw it
3. DuPont - use CPU system/no interest
4. Merrill Lynch - no interest
5. Sears - no time
6. Exxon - no time until December
7. Bendix - no interest
8. Bell Labs - "ethics" / selling their own unit
9. General Electric - no time

## Not Contacted

1. BC Northeast Ohio



# INPUT

PARK 80 PLAZA WEST-1, SADDLE BROOK, NEW JERSEY 07662

(201) 368-9471

October 4, 1983

Mr. Emmett J. Murtha  
Manager Licensing  
IBM Corporation  
Armonk, NY 10504

400 Colan-hus Ave  
914-765-3573  
Uivian

10/6 staff meeting  
10  
11:15 - end / intro. GPT

Dear Emmett:

Thank you for your time this morning, and for allowing me to briefly explain our research project on interactive video training. This letter will serve to confirm our role and nature of the project.

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We hope to be completed with the interviews by Friday, October 14. I appreciate your offer to review what we were doing. I hope your office will be able to arrange a time for us. The demonstration and evaluation would take one and a half hours.

Sincerely,

*Rob*

Robert M. Berntsen  
Senior Research Analyst

RMB/lcg

\* Letter of understanding  
IBM has agreed to use any info.

Jack Murry is corp.  
management training

\* Dallas → Dallas makes decisions →

Ed Center →

SRA → Curve wave

Bill Whitworth

10/13

IBM -

- Dallas
- They have interactive instruction
- May not be appropriate to meet
- Would talk if we suggested them to license it
- Would review only after product announced
- ~~1 1 1~~
- Might change opinion if he knew more about IBM relationship in Atlantic Beach



# YAIU Interactive Video Training

ATT Bob Show New Brunswick/Piscataway } working out 10/6  
201-699-7370

Exxon Dave Ford } 10/6 =>  
201-765-7488 } he or another  
Florham Park, NJ } person will call back 10/10

GE Dan Peller } 10/6 =>  
1255 Boston Ave } will discuss at meeting 10/7  
Bridgeport, CT 06602 } and call back  
203-382-3865

IBM Emmett Myrtha }  
400 Columbus Ave } Received letter 10/4  
Armenk, NY 10504 } Should be working on something  
914-765-3573

Sears Judy Wolfhauser }  
Sears Tower } 10/4 working on it  
Chicago, IL 60684  
312-875-7859

BC North East Ohio Garry Livingston } never reached. Was  
20660 E Ninth St } out sick. We did  
Cleveland OH 44115 } BC NYC & Phil so Rich said  
216-687-7722 } wait on

Bell Labs Piscataway 981-6430 Dan Claghton Training Mgr  
Declined (ethics) competition

\* Never talked to his boss C.F. Simone  
981-6984

Tram  
Dir





Company: De Pont

V712

page 1

HQ Address 1007 Market Street  
Wilmington DE

Telephone # \_\_\_\_\_

No. Div/Co's 14

No Employees 177K

Main DP CPUs 3033 = 5  
3081 = 1  
3701/58  
UNIV 1100/83

Reject

Robert Luft Gen Mgr Sep/Sept

↓  
Roger Wilke Dir

↓  
Fred Kirschman  
DP Training Director  
302-774-5389

Company heavily into  
CAI. Use  
CPU based interactive  
training IIS, Plato, etc

DP training is very  
centralized & very organized.  
Have seen some PC based  
systems & just not  
interested in another  
one.

They feel they have better  
method w/ their own  
CPU based CAI now



Company \_\_\_\_\_

page 2

1) MIZ UP/Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Dir Systems Prog

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Dir Operations

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4) EDP Training Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5) Corp Training Dir

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6) UP of Personal

Tel # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



Product

S-3

\* ~~"EXIT" hard to see~~

~~Superior explanatory  
text on video~~

UNIX

~~The introduction  
"Press CONTINUE to Begin?"  
To be realistic, student should type  
to response~~

~~ATG does not have a good cover  
AT&T rejected their video~~

~~Distinguish between the "command"  
and the "format" of the command~~

~~Improve <sup>quality</sup> video~~ "Hold" vs "Hold" confusion

~~Give more than 2 examples in  
lesson exercises  
must have a way to get caught out of sync  
Tie into reference manual~~

~~Use a large screen for light pen  
"M" vs "C" to get out  
Use graphics even on video to  
improve learning~~

← ~~"Don't use green"~~  
~~Prohibit use of video game like tones~~

~~Shorter modules~~

~~OK to start with light pen but  
not to be used for~~

~~Teacher is better than light pen~~

~~Why test light pen~~  
~~Divide of glass~~

~~UNIX Explain better titles or explain "ed"~~

~~Don't use "test"~~

~~The word "info" is not user friendly~~

~~"Elapsed Time" suggests pass~~

Screens can be cluttered - ~~as good as~~ scrolling

Page is not necessary

List 5-3 screens

Use key ~~press~~ more

Light pen can not divide

Check UNIX protocol question on list directors (1st & 2nd)

Relate product to manual (could have page in screen)

Need better deg. of cumulative + session in mgmt system

Look out of competency if they show mastery

\$1.5M - custom work item

1. Is there a market
2. Who would be the users of clients

DB - field Eng - Ins + Banking

- DB just makes  
All three have nothing  
Large population

Logical db design } two areas - high level  
IMS

Not interested in selling system - but software

High critical need - custom will pay added value

Each module will be 2x the typical cost (includes hardware)  
\$120 - 100 without hardware

Customers would want need about 40

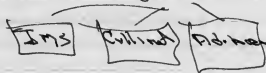
Must get sys 500 - 1 yr

Market sys + prescreening

Computer Tech Group (Chicago) Unix

Develop front end generic file

Laarman + Bruchtt  
Buchman  
Altri - logical DB



David Barber - Pres ITS

Have list who have seen demo

Have sales office in Chicago, D.C., Boston, LA

Bob

Alma

~~Bob~~

~~Bob~~

at 1st - Bill Lio

Long Lion

Western Electric

Training - 30 days

Unix + ITS - ~~to separate co.~~

Face-to-face

on site - logistic problem

At location - to use decision makers

20 Interviews

2 dev. quot

4 subarray interviews

5 post-interviews

30

two  \$35-40K

~~10 Flagship vs Characteristics of~~

P2 Find winners - look at 20

P2 Get characteristics of all

Look at just dp ones

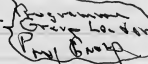
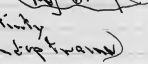
Must validate their feelings

Look at Unix

Try out different premium levels

Identify condition under which

ITS could replace competitors

MIS-Training Div.   
System Prog. 

Increase in productivity

Logic db (with startup training)

IS Interactive

Also look at JCB, C&G, etc

where there is no video

Need a technician for demo

" " regular " interviews

 Must be prepared to go back

Deliverable:  but good

Look across industries

They want an entry strategy + price

Ask about db + possible actions

Problems:

1. Do ? to find out if we should do more

2. If they say no do more

3. If they say yes hold till product is ready



Wed Aug 31  
10:30 →

Tues  
==

John Shaddockton

David Lubin

## Interactive Training

- Generic Inter. div. Video Group

• Market Research

• General DB training

- High skill, high need

IMS DB design  
Logical DB design

## Case studies, Examples

1. Are there good topics?

2. Other markets? Intro to PC  
How to use?

Why use a PC?

3. Military - ADA

3

Size

Other markets

Training or MIS Director

Training needs - what they'd pay

ACI

CTAD/CAM

IBM

DES

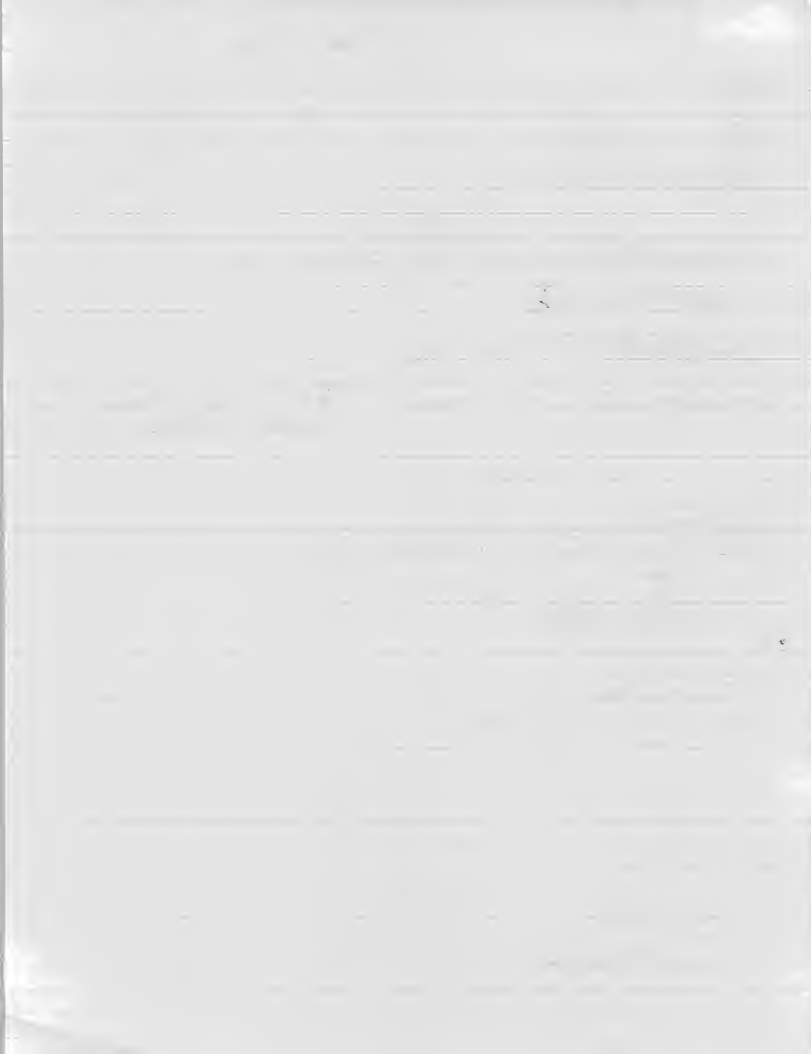
Hardware vendors

Yanka Group -

Talk to Pres

Soon as possible

Other possible areas:



Point 4 - No student learns if he isn't interested

Comprehension the student material if he doesn't understand

Learning more enjoyable + understandable  
↓  
involvement

Constructive solutions to modern learning problems

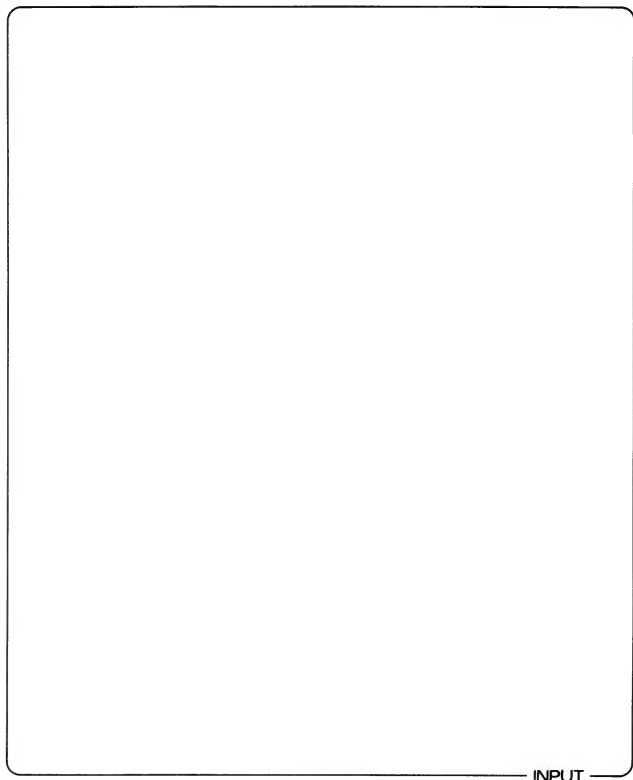
Image based : Teacher > showing

Interest

Acceptance

Concerns

Perceived value



INPUT

YAI Z

Company Information

Headquarters Address

Divisions/Companies

No. Employees

No. DP Employees

Main DP CPUs

Database Software

Operating Env. (IMS, etc)

No. EDP Training Sites

Personnel Information

Name

Title

Location

Phone

(for)

MIS VP/Director

Dir. of Sys. & Programming

Director of Operations

EDP Training Dir.

Corporate Training Dir

VP of Personnel

COMPANIES

AT&T

Exxon

Mobil Oil

Western Electric

JC Penneys

IBM

Bell Labs

City Corp

General Electric

United Technologies

Blue Cross/Blue Shield

Hartford Ins.

Merrill Lynch

Bendix

Du Pont

Sears Roebuck



## I Background

- A. Purpose
- B. Major questions
- B. Methodology

# 1. Clients interviewed/demographics

2.

## II Results

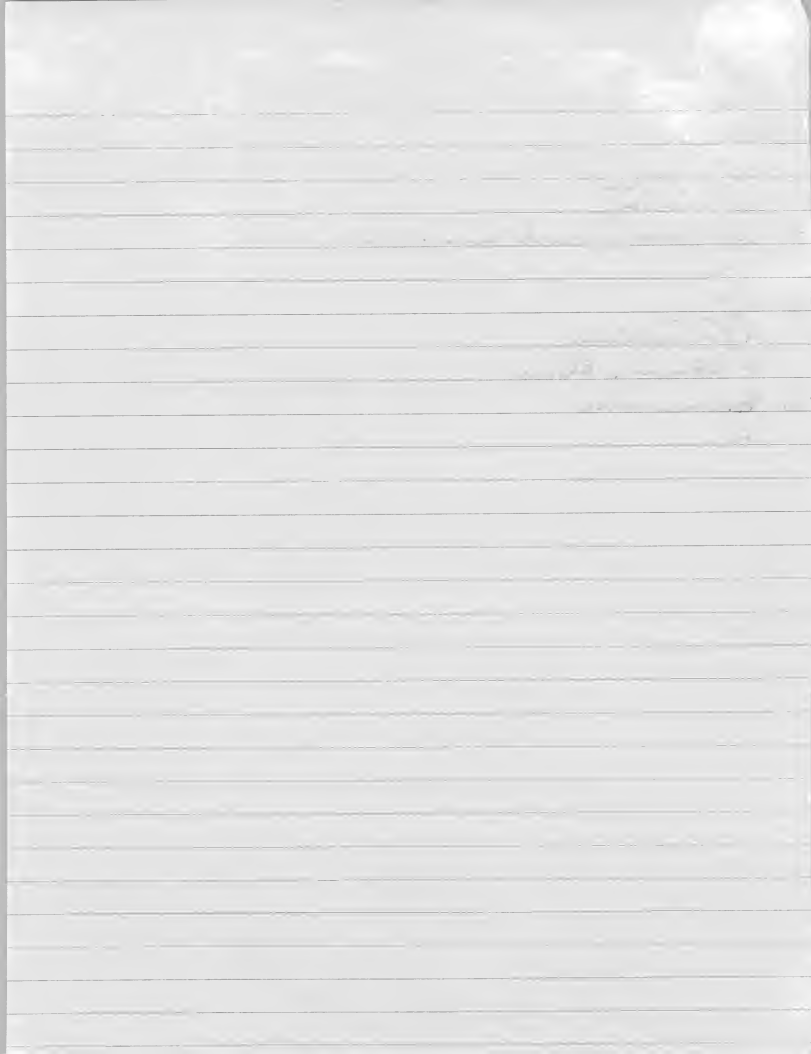
Assigned

A. Major questions

B. Company Studies

## III Recommendations

A.





Bob De Sica <sup>Dir</sup> ~~Eng~~ ReGen

\$100 without hard  
120 with "

1. How much live?

\$

2. How much on video?

3. What % of budget would you be willing to spend?

4. What % would you require video?  
live?

\$100/course

What need - course 1

how many modules in course 1 =  $4 \times 120 =$

Let's

5 days  $\times$  \$/day = \$1,000  $\times$  # classes = total \$/yr

\$/hr

day: 4 modules  $\times$  \$/day  $\times$  # class = total \$/yr

80% live

would you require live at 80%? If so, what price?

Do same for video (2x)

Management Systems explore this

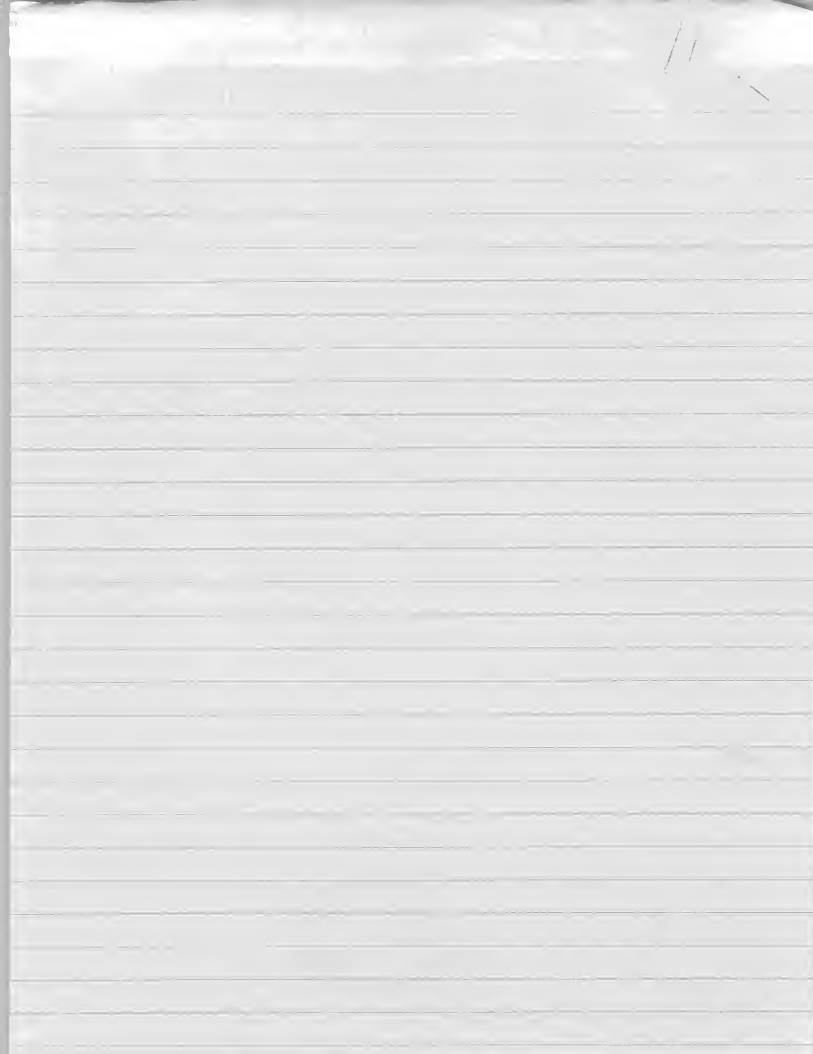
Item

video disc - \$800 - 1K

Network capabilities



High Risk area



## QUESTIONNAIRE ON DATA PROCESSING TRAINING

### NOTE TO INTERVIEWER

This questionnaire is meant to serve target telephone interviews or demonstrations.

1. Have you seen the ITS Inc. Interactive Video Training (IVT) demonstration?

YES ( ) NO ( )

o IF NO: Respondent is not qualified, do not interview.

- o IF YES: Was this a:

( ) Live demonstration

( ) Taped version

### REACTION TO DEMONSTRATIONS

2. First, I would like to get your overall impression of the demonstration. (HAVE RESPONDENT GIVE FREE-FORM ANSWER; PROBE FOR BOTH POSITIVE AND NEGATIVE RESPONSES.)

- o IVT

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- o Simulation

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- o Placement



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- 
3. Do you believe that any of the approaches you saw represents a "quantum leap" (significant change or dramatic change) in training technology?

YES ( ) NO ( )

Describe.

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#### COMPARISONS

4. What do you see as the advantages and disadvantages to each of the following training methods:
- o In-house training, with own instructors.
  - o In-house training, with outside instructors.
  - o Outside courses, seminars.
  - o Video training.
  - o CAI, using terminals from a mainframe.
  - o CAI, using a standalong mini or micro.
  - o Structured self-study (including manuals, text, programmed instruction).
  - o 3 structured on the job training (apprenticeships).





- o Simulation.
- o IVT.
- o Placement testing.
- o Other?

USE WORKSHEET ON NEXT PAGE.



Type Of Training	Advantages	Disadvantages
In-house training, with own instructors		
In-house training, with outside instructors		
Outside courses, seminars.		
Video training		
CAI, using terminals from a mainframe		
CAI, using a standalone mini or micro		
Structured self-study (including manuals, text, programmed instruction)		
Structured on the job training (apprenticeships)		
Simulation		
IVT		
Placement testing		
Other?		



5. How would you rate each of the following training method on their effectiveness (i.e., speed of learning, retention, etc.)? High, Medium Low.

<u>Type Of Training Method</u>	<u>Rating</u>	<u>Reason</u>
Live training	H M L	
Video training	H M L	
Structured self-study (including manuals, texts, programmed instruction)	H M L	
Structured on the job training (apprenticeships)	H M L	
Simulation	H M L	
IVT	H M L	
Placement	H M L	
Other _____	H M L	

6. The following are some of the most important subject areas in data processing training. (READ LIST)

- o Introduction to data processing and programming fundamentals.
- o Advanced programming.
- o Systems analysis.
- o project management.
- o Operator training.
- o Operations management.
- o Basic user education.
- o Advanced user education.

For each of these, what do you consider would be your first, second and third choices of instruction type for each, including the types of instruction you saw demonstrated? (PROMPT, IF NECESSARY).



Subject Area	First Choice	Second Choice	Third Choice	Reasons
Introduction to data processing and programming fundamentals				
Advanced programming				
Systems analysis				
Project management				
Operator training				
Operations management				
Basic user education				
Advanced user education				





## COURSE CONTENT

7. How important is each following course modules as part of an entry level EDP education course (1=Low importance, 5=High importance)

<u>MODULE</u>	<u>IMPORTANCE</u>				
DP Fundamentals	1	2	3	4	5
MVS	1	2	3	4	5
COBOL	1	2	3	4	5
JCL	1	2	3	4	5
TSO	1	2	3	4	5
Other (describe)	1	2	3	4	5

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## PURCHASING

8. How soon after a simulation product was available do you think your firm would take an active interest in it?

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Why?

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9. How soon after an IVT product was available do you think your firm would take an active interest in it?

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Why?

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10. In your firm's experience do you find that the typical price of conventional video-assisted instruction (VAI) averages about \$5 per student hour and the price of live instruction averages about \$40 per student per hours.  
YES ( ) NO ( )

IF NO: What prices are more typical of your experience?

VAI: \$ \_\_\_\_\_ per hour

Live Instruction: \$ \_\_\_\_\_ per hour

11. Would you expect to pay \$ \_\_\_\_\_ an hour for \_\_\_\_\_?  
(IF NO, WHY NOT)

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<u>Training Method</u>	<u>Yes</u>	<u>No</u>	<u>Reason</u>
Computer-based placement			
\$ _____	( )	( )	_____
			_____
Computer-assisted training			
\$ _____	( )	( )	_____
			_____
IVT			
\$25	( )	( )	_____
			_____
Simulation			
\$75(?)	( )	( )	_____
			_____

12. Assuming that each IVT unit costs \$\_\_\_\_\_,000~~x~~ over a three year period and that a basic EDP education library were available, how many units would your company commit to in an initial order?

\_\_\_\_\_

\_\_\_\_\_

13. How many more would you order each year over the next 3 years if your initial experience was up to your expectations?

\_\_\_\_\_

\_\_\_\_\_



14. If an operator console simulation package were available with an initial license fee of \$\_\_\_\_\_ and a \$\_\_\_\_\_ monthly charge, what would your level of interest be: High, Medium, Low? \_\_\_\_\_

o (IF LESS THAN HIGH): What different pricing structure would increase your interest?

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#### BASELINE DATA

Before I finish, could you provide me with some background information about your company's data processing and training operations?

15. What is your total 1982 EDP budget \_\_\_\_\_ million?
16. What was the training budget in 1981 and 1982 and how much will it be in 1983?

1981 = \$ \_\_\_\_\_

1982 = \$ \_\_\_\_\_

1983 = \$ \_\_\_\_\_

17. What percentage change do you see over the next three years in your DP training budget?

1983 \_\_\_\_\_ %

1984 \_\_\_\_\_ %

1985 \_\_\_\_\_ %

Why?

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18. \* How many programmers and analysts are on your staff? \_\_\_\_\_

19. About how many entry level programmers does your company train annually?  
\_\_\_\_\_

20. For each of the following types of training could you tell me about how many student hours and budgeted dollars are involved in each and what the principal outside (i.e., vendor) sources of training are?

<u>TYPE</u>	<u>HOURS</u>	<u>\$ AMOUNT</u>	<u>VENDORS</u>
In-house training, with your own instructors	_____	_____	_____
In-house training, with outside instructors	_____	_____	_____
Outside courses, seminars	_____	_____	_____
Video training	_____	_____	_____
CAI, using terminals from a mainframe	_____	_____	_____
CAI, using a standalone mini or micro	_____	_____	_____
Structured self-study (including manuals, texts, programmed instruction)	_____	_____	_____
structured on the job training (apprenticeships)	_____	_____	_____



21. What significant changes are you currently planning to make in the amount you use any of the preceding types of training (i.e., in terms of dollars, student hours, or vendor changes)? Why?

<u>Change</u>	<u>Reason</u>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

22. When simulation and IVT products become widely available, how will each of them affect your spending and student hours?

Simulation:

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IVT:

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23. In what ways would improved data processing lead to an overall increase in your data processing training budget?

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- o How much could your budget increase under these circumstances?

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24. How is the success of the training program measured now?

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25. What effect would improved training methods have on the way your company measures success?

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26. How would you rank your company for its receptiveness to technical innovations?  
(High, medium, low) \_\_\_\_\_ *5*

Why? \_\_\_\_\_

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THANK YOU FOR YOUR COOPERATION!!!

